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ABSTRACT

Focusing on the present state of book development in the Asia-Pacific region, where countries are separated by vast distances, this report examines measures that might improve local book industries and meet the needs for endogenous literature. The various sections of the report discuss (1) the book situation and needs in the Asia-Pacific region; (2) the intellectual aspects of book production, including endogenous authorship, translations, editing, copyright considerations, and the need for professionalism; (3) the physical aspects of book production, such as printing facilities and equipment, paper supplies, production costs, cooperative publishing, and publishing for rural areas; (4) the aspects of book distribution, including distribution channels, wholesalers, retail bookshops, book clubs, postal rates, market research, and library development; and (5) techniques for promoting the book industry, such as book development councils, financial incentives, training facilities, and improving reading habits and children's literature. Appendixes contain statistical tables, a summary of discussions and recommendations from a Unesco regional seminar on book development in the Western Pacific, and recommendations of the Unesco Collective Consultation on National Book Strategies in Asia and the Pacific. (FL)

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PROMOTING NATIONAL BOOK STRATEGIES IN ASIA AND THE PACIFIC— PROBLEMS AND PERSPECTIVES

by Abul Hasan

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FOREWORD

This document is one of a series prepared as background material for the World Congress on Books to be held in London, United Kingdom, from 7 to 11 June 1982. It is an attempt to evaluate the present state of book development in the Asia-Pacific region where countries are often separated by vast distances, often thousands of miles. It also looks towards the future and suggests some measures that might help to improve local book industries and thus meet the need for endogenous literature in the area.

The author, Abul Hasan, is Special Officer for Books in the Department of Education of the Indian Ministry of Education and Culture. He has had long experience in book development in India and the Asian region and has often acted as consultant to Unesco on a number of projects.

The author is responsible for the choice and the presentation of the facts contained in this document, and for the opinions expressed therein, which are not necessarily those of Unesco and do not commit the Organization.

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I. THE BOOK SITUATION AND NEEDS

Despite the fears being expressed about the future of the printed word, the fact remains that the world is producing at least one new title every minute. In 1978, world book production amounted to some 642,000 titles. Within a span of less than 25 years, world production of titles has more than doubled and the production of copies tripled. According to one survey, the world has produced more titles during the 25 years after 1950 than all the titles taken together produced before that date. It is thus gratifying to note that books are holding their own in an era of communication explosion. Among the mass media the book continues to remain the most essential tool of learning and communication, because it has some peculiar advantages, e.g. endurance, accessibility, freedom of choice and control of use, and economy. A great social quality of the book is that it is financed entirely by the price which the consumer pays for the final product, seldom receiving any support from subsidies or advertisement revenues.

Despite the phenomenal increase in world book production, the gains are not evenly shared and the bulk of the demand remains unfulfilled in all the developing regions. Over 80 per cent of total book production remains scattered in about 34 industrialized countries which represent only 30 per cent of the world population. The area of scarcity is spread over all Africa, all Latin America, all Asia excepting Japan, and the Pacific region excluding Australia and New Zealand.

(a) The Asia-Pacific scene*

Though geographically grouped into a region, the Asian and Pacific countries cover a huge area and are separated by several thousands of miles. They are full of contrasts - in size, population, per capita income, social philosophy and political system. There are sizeable differences in the rates of literacy and stages of book development. The area is vast, heterogeneous and complex.

The South Pacific subregion alone covers 30 million square kilometres, 10,000 islands, 4½ million people, 20 political entities and no language common to all, except English which is an alien tongue. In the book field the Pacific region presents such contrasts as the Kingdom of Tonga with only one bookshop to cater to the country's population of less than 100,000 people - a country where it is still possible to find schools where books are virtually unknown. Yet Tonga has a comparatively high rate of literacy and has the distinction of never having been under colonial rule. Like Tonga, most of the developing islands of the region have only one or two printing establishments, devoted mainly to newspaper printing and job printing for government, while trying to make do with cyclostyling so far as educational material is concerned. Books in printed form come mainly through imports. On the other hand, the two developed countries of the region, viz. Australia and New Zealand with an annual book production of about 3,000 and 1,000 titles respectively, have strong, efficient, progressive and successful book industries though they are faced with the problems of escalating book production costs, attracting the public to the book, strong competition with books coming from major English book producing countries and a declining proportion of educational and library expenditure going to books.

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* Part of the information on Australia and Japan contained in this document was supplied respectively by Mr M.G. Zifcak, President, International Booksellers Federation and Mr Shigeshi Sasaki, Executive Director, Japan Book-Publishers Association. The author acknowledges their co-operation with gratitude.

With about 57 per cent of world population, Asia[1] produced 18.3 per cent of world titles in 1978 which is a decrease compared with its share of about 20 per cent in 1955. The number of titles per million of population was 49, against Europe's 600 and the world average of 151. The increase in terms of absolute number of titles from 53,200 in 1955 to 117,000 in 1978, however substantial, is nullified by the population increase in the region.[2]

Asia is the largest reservoir of illiteracy in the world and poses a challenge bigger than ever before if one looks at the absolute numbers involved. As with literacy, so with book production. As pointed out earlier, the increase in absolute number of titles does not match, in relative terms, either in respect of per capita production or in comparison with world production over the last 25 years or so.[3]

Endogenous authorship and publishing are underdeveloped in South and South-East Asia and there is undue reliance on book imports. Foreign books, which constitute about a quarter of the region's consumption, remain inaccessible to a majority of Asian readers since they are in non-Asian languages and are not always suitably adapted to local developmental needs. The multiplicity of the Asian languages, on the other hand, leads to a fragmented market resulting in low print-runs - 1,000 to 5,000 copies on average, excepting textbooks - and high production costs. The real problem, however, is not so much the proliferation of languages as the paucity of potential readers. Owing to poor literacy, low purchasing power and underdeveloped reading habits, South Asia with 23 major publishing languages accounts for a small fraction of the number of titles published in Europe which has about the same population and a large number of main literacy languages. Again, complex local calligraphy and non-Latin scripts generally not easily adaptable to the latest typographical process, have an adverse effect on the quality, scale and speed of book production in Asia.

As to languages of publication, English continues to lead the field in many countries of South and South-East Asia. In India, for example, out of a total of 13,157 titles published in 1980, 5,595 were in English, the remainder being in the 15 or so recognized national languages. English dominates also in the Philippines, Singapore, Pakistan, Malaysia and Sri Lanka. English in these countries continues to be the language of the élite and the medium of communication in better known schools and colleges. The local book industry in these countries is handicapped by the built-in resistance of the English-speaking minority and competition with more experienced and professionally organized English-language publishers in and outside national frontiers.

As regards the types of book produced,[4] the region is badly in need of technical books, but gives prominence to social sciences, with pure and applied sciences representing about 10 per cent of the total output. In short, the overall situation is not satisfactory and the book supply target for 1980, i.e. 80 pages of strictly educational books per person per year set by the 1966 Tokyo meeting[5] has not been achieved.

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(1) Not including China, the Democratic People's Republic of Korea and Arab States.

(2) Table 1 in Appendix 1 indicates the share of Asia and Oceania in world book production and in world population since 1955, showing the world figures underneath in brackets.

(3) Table 2 in Appendix 1 indicates the number of titles produced in Asia and Oceania in the year for which latest figures are available.

(4) Tables 3 and 4 in Appendix 1 indicate book production in Asia and Oceania respectively by number of titles and by number of copies (UDC classes).

(5) Unesco Meeting of Experts on Book Production and Distribution in Asia, Tokyo, 25-31 May 1966.

The brighter side of the Asian scene is of course the prosperous book industry of Japan, one of the largest book producing countries of the world with an extremely wide variety of books and magazines averaging 40,000 and 2,100 per year respectively. The publishing industry of Japan has maintained an annual growth rate of a little less than 10 per cent over the last five years, though the annual increase in sales is more in favour of magazines (about 12 per cent) than books (about 6 per cent). The Japanese book industry is faced with the rapid progress of audio-visual media resulting in the diversified interests of the reader and generally decreasing print-runs (between 3,000 to 5,000 copies) leading to higher costs and lower profits.

An emerging publishing country in the Far East is the People's Republic of China which produced 17,212 titles in 1979 totalling more than 4 billion copies (an average of over 23,000 copies per title) and consuming about 400,000 tons of paper. With China's developing international relations, contacts between Chinese and foreign publishers are expanding rapidly.

(b) The book needs - a long list

So far as developed countries are concerned, Japan is meeting its book needs adequately. Indeed, it is faced with over-production and over-distribution leading to an increased percentage of returned unsold copies. Australia and New Zealand, because of their use of a world language, have to take special measures to protect endogenous books that would be more relevant to their needs and environment from the competition of foreign titles in that language. Besides, attention is also being given to meeting the needs of linguistic minorities in the two countries by promoting books in local languages.

Over the last three decades during which the developing Asian and Pacific countries have been able to assert their sovereign existences, there has been a perceptible improvement in economic structure and in the spread of education. There are visible signs of a higher standard of living and a general awareness of the important role of education in national development. National strategies in many countries are no longer centred exclusively on economic growth. There is also strong emphasis on social equality and distributive justice in the formulation of national development strategies. Education is now seen, not as a peripheral sector, but as one of the core elements of the development process. National policy objectives accord an important role to education in national and individual growth. The current education reforms in the region question the customary equation of education to schooling. Education is conceived as a lifelong process and a continuing activity after formal education. Primary education is being universalized and large sums of money are being earmarked for adult literacy and higher education. The whole region is in the process of erecting a superstructure of learning, scientific research and technological training.

However, constitutional and financial measures alone are not enough to produce the basic tool of learning, i.e. the book, to suit local conditions and environment. Despite a general belief that books constitute a basic and vital component of educational expansion, the book promotion process has been slow and book development has not been able to keep pace with educational development, resulting in a big gap in the demand and supply of essential reading material.

Winds of social and economic change during the last thirty years have enormously increased the need for all types of books in Asia and the Pacific, most of which are required in national and local languages. The population segment aged 15 years or younger in the developing countries of the region accounts for about 40 per cent of the total population, thus placing a heavy burden on governments to produce school

textbooks[1] in accordance with new curriculum requirements and at low prices. More and better supplementary materials are also required that would be relevant to the young readers' experience and the new developmental needs of each country. Children's books which arouse interest and provide enjoyment in a way that textbooks cannot do, are another important requirement.[2] There is a large percentage of school drop-outs - about six out of ten children in Asia drop out of the school system before even completing primary education. Because of this and rapid population growth, the number of out-of-school children and youth swelled in the seventies. Hence the need for books to teach and maintain literacy and books for continuing education. In many countries, disparities still exist in the distribution of educational opportunities between boys and girls, the opportunity gap favouring boys, especially at the secondary and higher educational levels. But in the field of non-formal education, participation of women often exceeds that of men, testifying to the strength of their unmet educational aspirations. Hence the need for more books for women at the non-formal and adult education levels. There are also imbalances between rural and urban areas in the quality and availability of education. Hence the need for producing relevant books for the rural population that constitutes about 75 per cent of the region's total population. There are other important spheres where books are urgently needed, e.g. books to train industrial workers and para-professionals, books to strengthen cultural awareness and provide pleasure and information for the public in general and books for higher learning and research.

The book needs of developing Asia and the Pacific thus form a formidable list. As literacy grows in future years, the requirements will multiply and pose a bigger challenge. It goes without saying that unless relevant books are available to the masses of this vast area in their own languages and in requisite quantites, there will hardly be any real improvement in various programmes of development and indeed in the whole process of individual fulfilment and national reconstruction. A real breakthrough will be possible only when effective steps are taken to conserve national resources, whatever they may be, and to lay down priorities for the development of endogenous book industries in complete harmony with local interests and requirements. In the following sections an attempt has been made to identify problems in different areas of book development in the region and to suggest possible remedies through national initiatives, mutual assistance and regional and international co-operation.

II. INTELLECTUAL PRODUCTION

(a) Endogenous authorship

The first step in any programme of book publishing is the writing of manuscripts. Without the author - or his assistants, the translator and adapter - the whole edifice of book production and distribution crumbles. A serious obstacle to the growth of the endogenous book industry in Asia and the Pacific is the shortage of active local authors and translators. This is not because of any lack of talent since the region abounds in intellectual creativity. The real problem is to integrate endogenous authorship into the economic circuit of publishing and to ensure a wide audience to authors in local languages. Existing small-scale publishing, which is the result of low literacy, underdeveloped readership, lack of credit

(1) Table 5 in Appendix 1 shows the production of school textbooks (number of titles and copies) in some countries of Asia and Oceania.

(2) Table 6 in Appendix 1 shows the production of children's books (number of titles and copies) in some countries of Asia and Oceania.

facilities and low profitability, has thus far been unable to do this. Publishers are reluctant to invest in new and unknown writers, and there are instances when authors have dissipated their energies in publishing their own work and failing to sell it anyway.

Side by side with economic reasons, a psychological factor works against the growth of local authors. In many countries which have attained sovereignty during the last three decades or so, there is still a social gap between the intellectuals and the masses - the potential writer and the ordinary reader. Many specialists have, by and large, lost command of the language of the people which is their own language, or they are unable to express themselves effectively in any national language except the language in which they have been trained. There is thus an "internal exile" which reduces many authors to silence vis-à-vis their own countrymen.

There is also a credibility gap between publishers and authors. Because of his financial superiority, a publisher has stronger bargaining power in the author-publisher relationship and is therefore in a position to exploit the author. There is, however, a growing awareness on the part of publishers that it is in their own long-term interest to protect their authors. The author also has a responsibility to the publisher if he expects a fair deal from him.

In some Asian countries, endogenous authorship suffers because of the large-scale import of foreign titles in the national language. One Asian country has banned the import of such titles.

Many countries in Asia and the Pacific have taken measures to promote local authors. India, Pakistan and Malaysia have provided tax concessions to their authors. Sri Lanka provides bank guarantee against loans for the publication of manuscripts. Annual cash awards to outstanding writers such as the Bhartiya Jnanpith Award to creative writers in Indian languages and the ASEAN award to South-East Asian writers of fiction and non-fiction encourage writing in national languages. Writers in China, in addition to their regular salary, receive royalties from the publishing houses on their published works. The state also provides travel facilities to professional and amateur writers to gather information and impressions to enrich their works. Australia and New Zealand have recognized Public Lending Rights to benefit the author. The Literature Board of Australia (for the Promotion of the Arts) grants fellowships to enable established Australian writers to devote all their time to creative Australian literature. It also sponsors National Book Council awards for endogenous literature. Besides, grants are given to cover living expenses or travelling and research expenses to writers engaged in important national and cultural projects. Another Australian scheme provides for promising young and new writers to devote full-time attention to their work. India also awards fellowships and subsidies to writers of educational works. While these and other measures being taken in Asia and the Pacific are welcome steps, more funds and facilities need to be provided for the promotion of endogenous authors, particularly in local languages.

(b) Translation and terminology

With the nationalization of the school textbook industry in almost all the developing countries of Asia and the Pacific, textbook writing at school level is taken care of by governments. Textbook writers are either paid employees or experts writing the text individually or collectively under government supervision. In most cases, a lump sum is paid to textbook writers without any stipulation of royalty.

While writing of school-books in local languages does not present difficulties in Asia, in the Pacific region writing and publishing have not made much headway in local languages. Many books originally published in English in Australia or New Zealand and answering the needs of the Pacific region as a whole may be translated into the local languages for use by the surrounding islands. The Departments of Education and national organizations for the development of vernaculars are, however, endeavouring to produce school primers and supplementary readers in local languages. For example, Papua New Guinea, a country of three million people speaking over 700 different dialects, has produced primary-school material and adult literacy pamphlets in nine of its languages. Other islands, for instance, Fiji, Western Samoa, Cook Islands and Solomon Islands also publish in local languages in a limited way. However, because of a common colonial heritage and the influence of the Christian missionaries, English continues to be the main language of commerce and education.

At the university level competent local writers are not always available, especially in the scientific and technical fields. The problem is aggravated by the switch-over to national languages (as the media of university education) in most Asian countries. No doubt a few countries like India and Malaysia have been making laudable efforts to provide standard textbooks and reference books in national languages for higher learning and research: yet, in scientific and technical disciplines, intricate problems of translation and technical terminology exist. As far as translation is concerned, there are hardly any training programmes or refresher courses. The remuneration for translation is generally low since it is often misunderstood as mechanical work. Even in multilingual countries, publishers rarely employ professional translators - full time or part time. Most publishing firms prefer to employ editors who are often expected to be bilingual, so that they may either undertake the translation themselves or cross-check the work of freelance translators who do manuscripts on a piecemeal basis and are often untrained. Occasionally, owing to lack of competence or facilities, translation of scientific and technical books takes so long that by the time the translation is published, latest advances in the field have rendered it out of date.

The rapid development of science and technology has raised problems of terminology which even the most developed countries are finding difficult to solve. They are having to adopt various innovations and break away from traditional usages in language in order to accommodate the complexities of scientific expression. The problem was solved in English partly by borrowing from the classical languages and partly by forming compounds out of native words with new meanings. These are the two major options and it is for the language experts of each country to decide to adopt one or the other, or a judicious mixture of both. The problem of technical writing is being solved in many Asian countries by coining technical and scientific terms. These readily available terms in different disciplines facilitate translations/adaptations. This is an easy and obvious way of relieving the shortage of endogenous books in certain disciplines until local writers and publishers are able to produce original works in the national languages. In multilingual countries like India, Pakistan, Malaysia and Singapore, there is a great need not only to keep open the windows on the world through translations from other countries, but also to translate from one national language into another in order to safeguard national integration and promote cultural unity and understanding. Through a Minorities Languages Translation Bureau, China is publishing translations for its linguistic minorities.

Translation provides a useful temporary substitute for certain kinds of book that eventually will be written locally. It has a special significance in the context of Asia and the Pacific where effective and accurate translation should be recognized as an essential professional skill - a creative activity in its own right - deserving suitable remuneration and recognition. Indeed, translators,

like writers, should be entitled to royalties as is the practice in Japan, and their names should appear prominently on all published copies of the translation. Prizes should be instituted, as in the Republic of Korea, for the best translations of different categories of book, and translators should be entitled to all benefits, such as tax relief, generally applicable to authors of original works. As has happened in India and Malaysia, professional associations of translators should be formed. It should be recognized that translation is an independent discipline requiring special education and training in addition to language study. As in the University of Malaysia, which conducts a postgraduate diploma course in translation and international interpretation, "Principles and Techniques of Translation" should be an integral part of university courses in journalism, book publishing and mass communication being taught in the region's institutes of higher learning. The National Translation Bureau should be officially sponsored to provide adequate training, expertise and facilities for translation to public and private undertakings, besides issuing monolingual, bilingual and multilingual dictionaries, glossaries, reference books and current information concerning terminology. This would ensure that translators in Asia and the Pacific emerge as a new cadre of specialists, trained in local languages, who could help in creating the needed books quickly in the languages of their countries.

(c) Copyright

Reproduction, adaptation and translation of endogenous and foreign works involve copyright and thus call for the protection of the intellectual property of the creators of original works as also for facilities for negotiating rights nationally, regionally and internationally. Most of the countries of Asia have national copyright law and many of them either adhere to international copyright conventions or have bilateral negotiations on mutually acceptable terms. English is the most commonly used foreign language in Asia and therefore the United Kingdom and the United States of America top the list of countries whose works are required to be reprinted or translated. The need for translation/adaptation is more acutely felt at the university level, particularly in scientific and technical subjects.

While Japan is an old adherent to copyright law and is a signatory to both the Berne and Universal Copyright Conventions, China has of late started drafting national copyright legislation that will make it possible for the country to join an international copyright convention. Recently China joined the World Intellectual Property Organization, which requires no specific qualifying action, but membership indicates the intention to participate in international copyright and patent conventions.

Except for Australia, New Zealand and Fiji, no Pacific country is as yet a member of any international copyright convention or has even a national legislation. Papua New Guinea did pass a copyright legislation in 1979 though it still remains to be effective. The lack of copyright protection is one of the main causes hindering the growth of creative writing and publishing in that country. Many national writers have deliberately withheld their works out of fear of having no legal copyright protection.

The problem of piracy has been assuming serious proportions in recent years. The infringement often takes place in developing countries though not by responsible and well-established publishers. The problem is not merely legal, but has many implications. The norms of the copyright system in each country are determined generally by the level of its social and cultural advancement. In some countries, even domestic (not to speak of international) protection of copyright has remained primarily on paper and in name. Where the domestic legislation is operative, it turns out to be ineffective in most cases for one reason or another. It was for

this reason that the Regional Seminar on Copyright and Neighbouring Rights for Asian and Pacific States convened jointly by Unesco and the World Intellectual Property Organization (WIPO) in New Delhi in December 1978 noted with satisfaction that several Asian and Pacific countries were in the process of revising their existing copyright laws in order, inter alia, to promote creativity, disseminate knowledge and provide the necessary incentives to authors, and recommended "appropriate amendments in the national copyright legislation in order that such legislation may cope with the needs of countries for strengthening the protection of copyright by suitable provisions, including penal and civil". The Seminar further recommended that simultaneously with the updating of domestic legislation, it was necessary to develop a suitable infrastructure for the implementation of copyright laws with a view to ensuring proper administration and expeditious enforcement of the rights. India has already drafted several amendments to the Copyright Act of 1957 so as to provide wider safeguards to intellectual property and to make the provisions more beneficial to Indian authors, besides bringing the copyright law into conformity with the requirements of the Berne and Universal Copyright Conventions, as revised in 1971 in Paris.

Two important reasons why some countries of the region have not yet ratified the international conventions are the information gap and foreign exchange difficulties. Copyright information should be disseminated as widely as possible to book industry associations and government agencies. Indeed, the International Copyright Information Centre at Unesco (since amalgamated into a joint service with WIPO) has been actively engaged in providing useful technical and bibliographical information on copyright matters which has facilitated the flow of rights from the developed to the developing countries. There are quite a few works produced in the developing countries that would be translated or reprinted not only in other developing countries but also in the developed ones. Since the mechanism for publicizing such works is not strong enough, international agencies should disseminate such works widely in the interest of a more balanced flow of information and knowledge. The scarcity of foreign exchange faced by some developing countries may be tackled either bilaterally between the producer and the user countries or through international funding.

It would be worth while to recall here another recommendation of the 1978 New Delhi Seminar on Copyright urging "publishers and copyright owners in developed countries to facilitate the transfer of their translation and reproduction rights to publishers in developing countries on easy terms so that developing countries outside the international copyright conventions may be induced to join these conventions and not find that remaining outside such conventions is more advantageous to them".

Another problem that is exercising the mind of copyright owners particularly in developed countries is multiple photcopying. In Australia, new amendments to the Copyright Act provide that educational institutions and libraries must keep records of multiple photocopying and pay an appropriate copyright fee to the copyright owners. In New Zealand, the Department of Education is co-operating in implementing an agreed system of voluntary restraint among teachers and a recent breakthrough in negotiations looks like guaranteeing copyright owners compensation for material copied. Photocopying, whether for commercial or for educational use, amounts to reprinting and there should be provision for adequate compensation to copyright owners, be they authors or publishers.

(d) Editing

A weak link in the book publishing chain in developing countries of Asia and the Pacific is the editing of manuscripts. There are not many publishing houses which employ competent full-time editors. Indeed the modern concept of editing

and the proper role and functions of a book editor are still not very clearly understood and appreciated by most publishers. The editor is the mainspring of the publishing process. A good editor often causes a good manuscript to be written. It is the absence of adequate editorial treatment to manuscripts that is responsible for the low quality and lack of professionalism found in many books produced in developing countries. The limited resources of paper and production materials are being wasted in the publication of defective or non-essential books. Moreover, the book is a very sensitive object and a bad one may be a real danger to the national interest. It is, therefore, time that publishers realized that it would be better not to publish than to publish a substandard book.

The difficult book marketing situation in the region, coupled with strong competition from foreign books, demands that books undergo most skilful editing with a level of expertise that not only blocks the publication of defective and poor writing, but helps enrich the manuscript. Expert editors cannot be made available on the low salary usually offered for this work in Asia, except for Japan(1) where the editor is usually the most highly paid employee of the publishing house. In the absence of regular training facilities the required supply of professional editors cannot be assured. Except for the Republic of Korea where refresher courses for editors are organized every year by the Book Publishers' Association, other developing countries have only ad hoc arrangements, which are few and far between. Sometimes these courses are organized in English, even if they are for editors of books in local languages. It is always advantageous to train editors through the medium in which they are supposed to handle manuscripts.

(e) Promoting professionalism

Sound endogenous authorship is the foundation of a sound book industry. Apart from the aforementioned steps that should be taken to recognize and reward creativity, adequate measures should also be taken to promote the professional efficiency of authors. Formation of national associations of authors in many countries of the region has lent strength and solidarity to their professional status. The Authors' Guild of India is a case in point. Set up in 1974 at the initiative of a few enterprising authors, the Guild has since gained wide popularity and enrolled over 500 members representing English and all the recognized Indian languages from different parts of the country. The Guild has set up a Good Offices Committee of Authors and Publishers (GOCAP) to settle disputes amicably, and a Litigation Committee to recover through legal channels its members' legitimate royalties from defaulting publishers. The Guild has drafted a fair model agreement between author and publisher, started a quarterly journal of its own and launched an authors' publishing house on co-operative lines. The Guild not only has the moral support of government but also receives financial assistance from the Ministry of Education for holding its annual national conventions.

There are hardly any programmes for exchange of authors or their delegations among the countries of the region. Such visits could be sponsored by the professional organizations of authors and financed by governments or international agencies. Governments should also encourage the professional associations of authors or other literary and cultural organizations to sponsor workshops and seminars for writers. The India International Centre at New Delhi has been organizing such workshops with government subventions. Originating as a national forum for writers, these workshops developed into a regional activity for Asian writers and lately into an international gathering of Afro-Asian writers. Unesco has sponsored a few writers from Asian Member States to participate in these workshops.

(1) Japanese publishers set up an Editors School in 1964 which organizes regular training courses in editing both at elementary and advanced levels.

III. PHYSICAL PRODUCTION

The book production scene in Asia and the Pacific is full of contrasts and variations. Even in developed countries like Japan and Australia, all kinds of printing technologies coexist, though the emphasis is shifting from traditional hot-metal to modern cold-type technology. Developing Asia is better placed in printing standards and equipment than the developing countries in the Pacific, where cyclostyling is in common use for low print-runs.

(a) Printing facilities and equipment

Japan is among the world's leading countries in modernization, sophistication and innovation in the field of printing. Despite a large number of complicated characters in the Japanese language, Japan has achieved a breakthrough in computerized typesetting by storing the characters in digital form in the computer memory. Even developing countries like Singapore and Hong Kong have grown into important international printing centres where printing standards are comparable to those obtaining in developed countries. Iran, the Republic of Korea and Malaysia are also fairly well advanced in the field. Pakistan, Thailand and the Philippines do not face any special problems in printing techniques and facilities. The use of computers for Urdu script introduced recently in Pakistan will lead to far-reaching developments in Urdu printing and open new vistas for other languages written from right to left, e.g. Persian, Sindhi and Arabic. The computerized technique will enable the stylized Nastaleeq type to be used in book printing with speed and precision. There has also been great progress in China's production capacity and printing equipment, though there still remains a wide technological gap between China and technically advanced countries.

However, many countries in Asia use obsolete equipment and outdated machinery. Even within the aforementioned developing countries one can find the most modern presses printing newspapers, coexisting with bits and pieces put together in make-shift workshops to cater for local printing demands. In binding also, facilities for perfect and mechanical binding are available side by side with collection, collation and sewing by hand. Indeed bookbinding is a small-scale industry in many Asian countries where one finds manual binderies in residential localities and small bazaars.

On an average, the printing industry in Asia is using an intermediate technology. Hand-composing is gradually being replaced by mechanical composing and letterpress printing by offset lithography. The phenomenal growth in newspapers in the region has led increasingly in recent years to the installation of web-offset and rotary machines. These machines have a great potential for printing in spare time low-cost textbooks, particularly where colour is needed, which does not seem to have been sufficiently exploited as yet. Letterpress and conventional flat-bed machines continue to provide a solution to small-scale production, shortage of skilled manpower and the need to retain labour-intensive projects. The future, however, belongs to filmsetting or photocomposition because they have an advantage over type-composition for non-Latin alphabets used in most Asian countries.

The wide variety of scripts and typography poses difficulties for the type foundry and printing industry of the region. An Experts' Meeting on Typography in Asia convened by the Asian Cultural Centre for Unesco in Tokyo in 1974 observed that there was not enough awareness in the region of the important role of typography, the basis of printing, no matter what scripts - Latin or non-Latin - were used. The type-faces available for many languages of Asia were regarded as extremely limited and inadequate by the experts.

In the Pacific region, Australia has a fully developed book-printing industry using the latest equipment and techniques, including computer photo-typesetting. Printing being a labour-intensive industry, higher salaries for management and labour and the changeover to modern equipment and processes have meant an increase in production cost which has often outstripped average inflation rates. Consequently, many Australian publishers are printing their books overseas in Japan, Hong Kong or Singapore. To counteract this trend which causes loss of work and consequent unemployment in the industry, the government subsidizes the cost of production to the extent of 25 per cent of the printing cost. This means that for every book printed in Australia under certain conditions, the government pays a quarter of the printing and typesetting costs. New Zealand too, finding its own printing industry either inadequately equipped or uncompetitive, is compelled to resort to overseas printing and binding.

In the developing countries of the Pacific, there is hardly any commercial book printing except in Fiji. Book-printing establishments, if any, are run either by governments or church agencies. Book illustrators and designers are conspicuous by their absence. Western Samoa is reported to have no blockmaker. Owing to lack of adequate production facilities or the high cost of printing, many worthy manuscripts emanating from Papua New Guinea and Cook Islands have had to be printed abroad. Most curriculum materials in these countries are produced by duplicators. The University of South Pacific which was established in 1968 as a regional institution with headquarters in Suva (Fiji) has been producing a great deal of curriculum and teaching material for these countries with financial assistance from United Nations agencies. The USP also provides assistance for the printing of academic works locally.

(b) Supply of paper

One major obstacle to the growth of an endogenous book industry in developing Asia and the Pacific is the persistent shortage of printing paper[1] at a reasonable price over the last ten years. While a few countries like India, China and the Philippines in Asia and Australia and New Zealand in the Pacific have a fairly developed paper industry to meet the bulk of their demand for ordinary book printing paper, the others depend largely on imports. In view of the constantly rising demand for paper which has more than doubled over the last decade owing to the spread of education and literacy, and the paucity of foreign exchange for import in many countries of the region, the situation has become alarming and calls for urgent remedial action at national and international levels. At the national level, the paper-producing countries should step up the production of cultural varieties of paper and explore the possibilities of recycling waste paper. The governments concerned should provide as far as possible not only long-term credit facilities - for paper production is highly capital intensive - but also incentives such as reduction of customs duties on cultural paper or shifting the tax incidence on industrial varieties and subsidizing royalties on forest resources. Paper-scarce countries should set up pulp- and paper-producing units and harness their own untapped resources of raw materials, chemicals, water and electric power. Nepal, which depends entirely on paper imports, recently decided to establish a paper mill in collaboration with the Government of China. The mill which will use sarai grass and wheat straw - available in large quantities in Nepal - is expected to operate within five years with an annual production of 3,000 metric tons of writing and printing paper. Some economy measures also appear to be necessary in the use of writing and printing paper, e.g. confining its consumption to essential purposes, reducing pages and titles of textbooks wherever possible, promoting the sale of

(1) The share of Asia and Oceania in the production and consumption of newsprint and of other printing and writing paper appears in Tables 7 and 8 in Appendix 1.

second-hand books, avoiding frequent changes in the syllabi, using newsprint for the production of ephemeral material, and reviving the use of slates and wooden writing boards in the lower grades.

Since paper is the most essential and expensive raw material for book production, governments in developing countries might ensure, in co-operation with the domestic paper industry wherever it exists, that a certain quantity of ordinary printing paper is made available to book publishers, particularly publishers of educational books, at a concessional rate. In India, for instance, cultural paper has been declared an "essential commodity" and white printing and cream-laid paper required for educational publications is being made available to publishers at a government-fixed concessional rate which is nearly half the market price. It is obligatory for paper mills to produce at least 30 per cent of their total output in this concessional variety. Some 50,000 metric tons of writing and printing paper were also allowed to be imported duty free during 1979-1980 to meet the requirements of the general public, including the publishing industry. Import of printing paper, including newsprint, should likewise be liberalized by countries faced with a continuous paper shortage.

A recent Commonwealth study has revealed that there is no real paper shortage at the global level since production still outdistances demand. The real problem seems to be proper distribution at reasonable prices. Hence, removal or reduction of tariffs and taxes on newsprint and printing paper used for educational purposes might well be examined by governments of the importing countries. Since the import of paper involves substantial freight charges, transport costs are very high when small quantities are ordered. Each importing country might therefore consider creating a central pool for bulk ordering which could reduce landed cost. Heavy capital investment with a long gestation period is an essential requirement for the expansion of pulp and paper industries, which most developing countries of the regions may find difficult to afford. Apart from the global measures that could be taken to tackle the situation, developed countries could exercise restraint in using paper for non-essential purposes to reduce pressure on the market. The outright gifts of cultural paper to a few countries of the region, e.g. India, Indonesia and Nepal, under bilateral or multilateral aid programmes have been quite helpful in the past and may continue to be made in the face of unrelenting shortage and spiralling prices of paper in the region.

(c) Cost of production

With the increase in the cost of printing materials and wages, the cost of book production has also increased everywhere. Because of the constant rise in their prices, general books are slipping out of the reach of the common man who already has a low purchasing power, the per capita income being less than US $200 in most countries of the region. Moreover books are a sensitive commodity and any increase in their prices rouses general resentment. It has been observed that any escalation in the prices of essential commodities for meeting basic physical needs is considered a normal phenomenon in view of worldwide inflation. However, an increase in the price of books meets with public criticism. Stiff consumers' resistance to an increase in book prices can also be explained by the fact that the same book could have been sold at a much lower price, if the print-run had been large. Some publishers concentrate on sales to libraries and institutions, fixing the price five to six times the production cost, so that they reach the break-point when a few hundred copies are sold. The price thus fixed drives the book outside the reach of an ordinary buyer.

Many publishers in Asia claim that the prices of books have not increased over the years in proportion to the cost of production or in proportion to the prices of other commodities. Even in Japan, where most things are expensive, books are

comparatively cheap. The acceptable price for a general hard-cover book is ¥1,500 (US $7.50) and an average paperback price is ¥300 (US $1.30). The world's cheapest books are, however, available in China, the average being less than 40 Fen (US $0.30) per title. The publishing houses in China are not guided so much by a profit motive as by dissemination of culture and knowledge. Reduction in prices is due mainly to huge print-runs. Some specialized publishing houses receive a subsidy from the state because they do not publish for mass consumption. Books are priced according to the number of pages and standard rates set by the Chinese Government which apply to all publications, with a slight variation, according to quality.

In Australia, where book prices seem to have outstripped the general price level, a view has been expressed that book prices are not high in view of the valuable role of books for the development of the individual and the progress of society. Yet a 2½ per cent levy of the sale tax on books in the 1981 budget elicited concerted opposition from the book industry associations and the National Book Council of Australia. In most developing countries, lack of purchasing power and absence of a book culture have compelled the book industry to curtail its margin of profit instead of increasing prices, so as to keep the business going. There is a genuine desire on the part of everyone to hold the price line of books as far as possible, as was evident in the international seminar on this theme organized at New Delhi in February 1982.

As far as school textbooks are concerned, governments of almost all developing countries in the two regions are subsidizing the production cost. Even developed countries subsidize their production when textbooks are distributed free to poor and needy children. One view is that government subsidies should be confined to users or buyers of books, including libraries, since subsidy at the production end gives rise to a false economy that creates complications in the long run.

A Unesco-sponsored survey(1) carried out in 1975 to analyse the economics of book publishing in developing countries revealed that composition and paper are the heaviest items of cost in an edition of 1,000 copies in Asia. While composition accounted for 41 per cent of the total manufacturing cost, paper was responsible for 32.4 per cent. The cost analysis showed that composition charges were reduced from 41 per cent to 17.8 per cent of the total cost with an increase in the print-run from 1,000 to 5,000. The survey further revealed that if the total manufacturing cost was 100 in an edition of 1,000 copies, it came down to 54 in a 5,000 copies edition. The most effective way of reducing cost is therefore to increase the print-run, so that the average edition, which at present ranges between 1,000 and 5,000, is closer to 5,000 than 1,000. A large print-run, however, presupposes a wide market which in turn depends on increased literacy, development of the reading habit and an improvement in the general economic situation. Even in the present context, the answer lies in the mass production of pocket books which offers great economy in cost. In this regard, the conclusion reached by the 1966 Tokyo Meeting of Experts on Book Production and Distribution in Asia is still pertinent, viz. "that the various improvements of which Asian publishing as a whole stood in need applied with special force to the mass production of paperbacks which was fundamental to the expansion of the book industry in the region as a whole". This type of publication is not characterized so much by its size or type of binding as by its low price, the system of distribution employed and its publication as part of a series. Some Asian countries, e.g. Pakistan and the Philippines, have started producing literary works in the format of newspapers and magazines and have found the experiment successful.

(1) SMITH Jr., Datus C., The Economics of Book Publishing in Developing Countries, Paris, Unesco, 1977.

One way of reducing cost is to remove or reduce taxes and duties on the import of book production material. A unique feature of the book industry is that while there are hardly any restrictions or duties on the import of the finished book, all kinds of custom duties and tariffs are levied on the import of raw material used in manufacturing the book. While this policy may be justified where it is desirable to give protection to domestic industries, it does not seem to be the case in all countries. Most developing countries of the two regions under review which have not yet joined the Unesco Agreement on the Importation of Educational, Scientific and Cultural Material (the "Florence Agreement") might consider doing so, especially in view of the Protocol to the Agreement adopted by the Unesco General Conference in Nairobi, in 1976. The Protocol contains a provision covering "material and machines used for the production of books, publications and documents". Under this provision, which is optional, duty-free entry may be granted to materials such as pulp, paper, inks, glue and machines for the processing of pulp and paper as well as printing and binding machines not being manufactured in the importing country. Since many developing countries do not seem to be fully aware of the implications of the Agreement and the Protocol and the term "educational materials" is interpreted in various ways, there is need for laying down proper guidelines for the importing countries and the authorities concerned so that the full benefit accruing from the two instruments may be obtained. It is hoped that the developing countries of the two regions will, as far as possible, remove customs duties and tariffs on the import of material used in manufacturing books. Restrictions on such imports do not help a country's economy, but tend to hinder it in the long run. In one South Asian country, for example, the cost of printing material is so high, mainly due to high import duties, that many printing jobs are executed outside the country while much of the printing capacity of the country remains idle.

(d) Co-operative publishing

Co-publication of books can offer great economy of scale, particularly in countries where a multiplicity of languages divides the market and reduces the print-runs. It can be achieved by making common use or joint print-runs of artistic and design work and by printing the text separately in several languages. This type of multilingual publishing is resorted to where illustrations are a major part of the work, as in children's books, art books, books on physical geography and basic sciences, and illustrated reference works. Through the sharing of costs on art work, blocks or plates and a bigger edition, which in itself offers economies of scale, a publisher catering for a small language group can place books on the market at very competitive prices. Publishing multilingual editions is, however, not without limitations. Editorially, the preparation of suitable texts in the original language and in translation to fit into the same size and space when there are no uniformities in script and style poses great problems. Production-wise, one basic model shapes the whole programme. All the text and illustrations have to be fitted into the master dummy prepared by the original publisher. But these difficulties are inevitable in any new project of this kind. Mutual adjustment and co-operative work can considerably ease them.

Quite a few countries in Asia are multilingual and could greatly benefit from co-operative publishing. India, for example has been experimenting successfully with multilingual publishing of children's books, in which illustrations represent a substantial part of the cost of production. The National Book Trust, India, an autonomous publishing organization, provides children all over the country with good quality multilingual books that are well printed and profusely illustrated in many colours. These books have a uniform format and reach the consumer at a uniform subsidized price. China has also entered into co-publishing arrangements with American, European and Asian publishers for books on fine arts and tourism.

In this connection, mention should be made of the project for publishing common reading material for Asian children sponsored by the Asian Cultural Centre for Unesco, Tokyo, in 1972, in co-operation with Unesco. The Centre has published, besides other material, the master editions of six volumes of children's books for the 9 to 12 age-group on the folk tales and festivals of Asia, as well as volumes on Asian children's games and modern short stories of Asian authors for young children in co-operation with the national agencies concerned. Two new projects in hand are "Cultural Heritage and its Surrounding" and "Humourous Stories in Asia". The ACCU underwrites remuneration to national authors, illustrators and translators, loans free of charge, the film positives of illustrations and in certain difficult cases even buys copies of national editions on a matching basis. The national editions of several of these titles have been released in more than 20 Asian languages. If such a project can be fruitfully organized at the continental level, there is little reason why a similar programme could not be a success on a national or subregional scale. The success of this Asian experiment has inspired many countries outside the region - both developing and developed - to translate and publish some of these titles.

Co-operative publishing can also take the form of coeditions of certain types of book published in a language that is spoken in several countries. Besides English, there are many languages in Asia in active use by more than one country, e.g. Persian, Urdu, Bengali, Tamil, Bahasa Malaysia, Chinese. Asian countries using these languages may take advantage of the economies of large-scale production, if an enterprising publisher takes the initiative at the stage of planning books in these languages and if publishers of other countries in the group co-operate. They may either import the published book at a lower cost or import only the printed sheets and have them bound locally thereby effecting a saving on the foreign exchange bill on binding. Such an arrangement can also solve the problem of non-availability of quality paper in some countries; they can obtain loose sheets printed wholly or partly from the country that undertakes joint printing. Where this would have an adverse effect on the domestic printing industry, the alternative would be to import films for printing locally and pay for their use. The programme has to be based on a reciprocal arrangement satisfying the special needs of each participating country. Experiments in collective writing and publishing of textbooks in subjects like language, science and mathematics have been tried with success, especially in neighbouring countries using a common language and having much in common in their educational systems.

Asia has already made some progress in co-operative publishing, and the Pacific region made a beginning when the Unesco Regional Seminar on Book Development in the Western Pacific held in Sydney in March 1980, recommended the drawing up of "Co-publication schemes involving the major publishing countries and the developing countries in the region to reduce production costs and provide accessible reading material related to local identified needs". Later at the International Booksellers Federation Congress in March 1981, a co-publication seminar sponsored by Unesco took place, during which it was decided that a co-publication agency for the Western Pacific countries would be established by the Australian National Commission for Unesco. The plans for bringing the agency into existence are under way.

(e) Publishing for rural areas

Despite the continuous exodus to urban areas, about 75 per cent of the people in Asia and the Pacific still live in rural areas and distant islands, whereas the bulk of the production and distribution of reading material takes place in large cities and urban areas in an environment entirely unrelated to their own. The publishers and promoters of books in Asia are now seriously considering whether the book famine in the vast rural hinterland can be satisfactorily met from the urban centres alone, or whether there is need to develop a production technology

and distribution network to meet the specific requirements for reading materials in rural areas. A Unesco-sponsored study(1) made in 1974 on the supply of books to rural areas of Asia revealed certain types of reading material that can proliferate in rural Asia. According to this survey, Bangladesh indicated interest in fiction and traditional ballads relating to contemporary events; religious almanacs and mythological epics were popular in Indian villages; folk literature, fiction, magazines and comics could find a market in rural Philippines; villagers in Thailand were interested in newspapers and magazines containing serialized novels and some politics and economics; in Sri Lanka, newspapers were popular, while old people read religious texts available in the village temples.

In the Western Pacific, some sort of vernacular publishing is undertaken in the capital towns of the developing countries though it is not specially aimed at the rural population or people in distant islands. In Papua New Guinea, the Summer Institute of Linguistics is promoting vernacular literacy in some languages of the country's mountainous highlands. But the topography and the limited road network of the country make it difficult to distribute the literature in rural areas.

There is no doubt that the vast and potentially rich human resource in rural areas and distant islands of the region has to be fed with suitable literature to achieve any degree of national development. The publishing industry has a great social responsibility towards this sector and should ultimately stand to gain in the process. Apart from the literature being produced by governments, necessary steps have to be taken to promote entrepreneurship for rural publishing. Indeed the production of adequate inexpensive reading material in rural areas calls for a multidisciplinary approach - a co-operative endeavour of public and private sectors on the one hand and urban and rural functionaries on the other - that should also take care of the existence of oral traditions and solicit support from other mass media, such as radio, film and television.

Many Asian countries have been carrying out surveys of reading habits, but they have been confined mostly to cities and urban clientele. There is an obvious need to conduct intensive investigations to identify the reading material that is needed in rural areas and then take the necessary steps to produce and distribute it effectively. Whether this should be done centrally or through decentralized agencies may be decided by the national authorities so as to meet their own situation.

"Publishing in Rural Areas in Developing Countries" was the theme of an international Unesco-assisted seminar, the first of its kind, organized in New Delhi in March 1980. The seminar observed that while the needs of the rural reader can be met to some extent by the urban-based material, the bulk of the material was to be generated through a separate infrastructure with a bias towards the rural clientele. The seminar urged governments of the developing countries to instal low-cost printing equipment in selected rural centres as pilot projects to produce such materials, designs and formats that would suit the specific needs of those areas. On the basis of the experience gained, the low-cost projects could be expanded into a large network covering the entire country.

In Asia, a beginning has been made by Indonesia where it is proposed to provide every district with a micro mobile printing unit called Micropu. The Micropu will move from one subdistrict to another within a district to print learning materials (newsletters, leaflets, posters) prepared by district field workers in non-formal education. The Micropu is mounted in a mini-bus equipped with a small offset printing press and a two-man crew - an experienced journalist who is also the co-ordinator of the Micropu activities and a driver-technician who can handle the

(1) THAPAR, Romesh, Book Development in National Communication and Planning, Karachi, Unesco Regional Centre for Book Development in Asia, 1975.

whole technical operation. Under the project, which has been financed by the World Bank loan through Unesco, a number of Micropu units are operating in Indonesia on an experimental basis, serving rural communities with graphic communication - newspapers, pamphlets, folders, leaflets, posters - which were practically non-existent outside the urban centres.

A welcome development in Asia is the entry of the Asian Cultural Centre for Unesco into this new field of readership. ACCU has introduced a project for co-publication of printed materials for the rural communities that includes simple attractive booklets, wall newspapers and posters. In May 1981, a meeting on Asian Joint Production of Printed Materials for Neoliterates in Rural Areas, held in Tokyo, evaluated sample wall papers and leaflets intended for neoliterates prepared by the ACCU and drew up a work plan for the production of their prototypes.

IV. BOOK DISTRIBUTION

All efforts to produce suitable reading material are nullified in the absence of a proper distribution network. Book distribution is thus a most important operation which does not appear to have received the attention it deserves in the book industry complex of Asia and the Pacific. The book trade in most developing countries of the region is characterized by inadequate distribution channels, unrealistic discount structures, ad hoc trade practices, insufficient promotion and bibliographical tools, under-capitalization, unskilled personnel, defective methods of institutional buying and unhealthy competition. In short, the whole layer of book distribution is disorganized and unsystematic. The task becomes more difficult when the reading habit is underdeveloped, the market is divided linguistically, transportation facilities are inadequate and purchasing power is low, as is the case with many countries in the region.

(a) Distribution channels

Wholesalers and retailers are not merely passive links, but essential intermediaries between the creators and readers of books. A proper distribution channel through these intermediaries seldom exists in developing Asia and the Pacific. While the movement of imported books often follows a set trade pattern and is served with some pipeline to reach the consumer, the local book is usually confronted with all the hazards and idiosyncracies of the book market. Local publishers are often small-scale units which find it difficult to have proper links with the big wholesalers in large cities. The wholesalers who are accessible demand a very large discount which local books with low rates of profitability can hardly afford. In most cases the wholesalers are also publishers and often prefer to sell their own stock to the detriment of other publishers. The endogenous publisher is thus forced to sell whatever he can directly to libraries and individual readers and is often deprived of the valuable services of the wholesaler and the retailer. Sometimes there is competition and undercutting among the publisher, the wholesaler and the retailer for securing orders from libraries and other public institutions. The interests of the book trade lie in a proper working relation of its different professionals.

In Asia, Japan has a unique distribution system for books and magazines which serve the readers effectively in every nook and corner of the country. Publications brought out by over 4,000 publishers flow automatically through wholesale channels (60 distributors, of which 5 have a nationwide network and two of these five occupy 65 per cent of the share) to 20,000 retail bookstores spread thoughout Japan. The high degree of automation sometimes leads to neglecting the output of small-scale publishers and the system does not always meet the readers' special requests if they are outside the distribution pattern.

China has a system in which all distribution is centralized and has to be channelled through the distribution and warehouse circuit of a state agency called Xin Hua Book Store. There are more than 5,000 retail stores in the Xin Hua network averaging roughly one for every 200,000 people. Because of the vastness of the country a rural distribution network has been established with more than 74,000 co-operatives having book retail counters.

As for the Pacific, Australia and New Zealand have almost all kinds of book distribution channels and are using them successfully. The local booksellers have to coexist with the agents of many overseas publishers who have set up their own warehouses in these countries for the distribution of their books. This "closed market" practice under which orders for an overseas publisher's books can be dealt with only by his local office (even if it does not have stock) has led to increased overheads and consequent escalation in the prices of books. The Australian book-buyer has thus felt the pinch of local higher prices of overseas titles and at times of inordinate delays in their arrivals. This kind of monopoly is creating problems in Papua New Guinea also where all imported books come through a wholesaler in Australia which receives its supplies directly from publishers and then adds its profit margin for wholesaling to Papua New Guinea. Strong moves are under way to make retailing of imported books possible at much less cost than at present.

(b) Wholesalers

Wholesalers play an important part in stimulating the circulation of books. They provide the retailer with a single source for obtaining books issued by many different publishers. The publishers on the other hand have the advantage of making bulk sales to the wholesalers instead of having to deal separately with each retailer on every sale. The wholesaler is also a kind of financer of the book trade because the period for which he receives books on credit from the publisher is often less than the time taken in obtaining payment from the retailer. The wholesaler also co-operates with the publisher in the development of promotional materials and campaigns and sometimes shares the cost of such promotion.

The institution of wholesalers is comparatively new in Asia. The 1966 Tokyo meeting observed that no genuine wholesale structure existed in the region, except in Japan. Even today there are hardly any wholesalers in the developing countries of the region, except for a few in Korea, Malaysia, India and Singapore, who perform the real functions of a wholesaler - stocking, financing, trade promotion and wide-spread sales - on an objective professional basis. It seems rather difficult to achieve a real breakthrough in book distribution in Asia without national wholesale distribution agencies. Long and difficult routes between publishing and reading points, inherent difficulties in marketing the book as a commodity and the multiplicity and variety of trade practices and discount structures in each country demand the creation of special officially sponsored central organizations to concentrate solely on getting local books from the publishers to the farthest distribution outlets. Playing a dual role, these professional agencies would not merely establish a publisher-wholesaler-retailer relationship on sound lines, but also act as a catalyst in the movement of books to every corner of the country. Acting as a layer of professional marketing, these organizations would pick up all the books of local publishers from both the public and private sectors and put them on sale. The financial resources of these distribution agencies could be made available, at least initially, from public funds regardless of whether their status were official, semi-official or private, as this would depend upon the particular situation of each country.

There are hardly any wholesale distributors of books in the Pacific islands. Government publications are generally distributed through schools, health centres and government liaison personnel in various official agencies. A successful

experiment has been carried out in Papua New Guinea for the distribution of religious books. In the Northern Province one of the church-related distribution centres has established small market bookstalls which are open only on market days. This approach to distribution is proving successful and this model may be employed in other provinces.

Effectively organized wholesale distribution agencies can revolutionize the book trade in the developing countries of the region. The Unesco Collective Consultation on National Book Strategies in Asia and the Pacific, held in Karachi in April 1981, regarded wholesale distribution as an important aspect of the book trade and recommended that "Unesco undertake the collection and compilation of a series of case-studies on existing wholesale book distribution operations in the region and circulate this widely so that it could serve as the model for appropriate action to be taken".

(c) Retail bookshops

The bookseller is the mainstay of the book trade. He maintains a constant supply of volumes on his premises, and collects the sale proceeds that support the book business. The bookshop also provides service for the reader who buys on impulse and a place where potential buyers may browse. It is also the publisher's touchstone of public taste and demand. A bookshop is also a good barometer of the cultural level of a community. Again, a good bookseller does not only meet the local demand by stocking the best sellers. He also creates demand by displaying a host of other titles. A professional and devoted bookseller can be a good adviser on the existence and availability of certain titles, perhaps the only source of information in some developing countries of Asia and the Pacific, where even basic bibliographical tools are conspicuous by their absence.

In Asia, Japan sets a good example of a thriving book retail business. The number of bookstores is constantly increasing, though the trend is now in favour of big bookstores, which is having an adverse effect on small booksellers. This may lead to polarization, that is, while big bookstores will stock as many publications of all kinds as possible, small- and medium-size stores will specialize in certain kinds, e.g. literary works, children's books, books for professionals, in accordance with the readership of their locality.

In most other Asian countries, the importance of retail bookshops in the distribution of endogenous books is matched only by the extent to which it is neglected. Lack of easy credit facilities and ever-rising overheads are constantly depressing the net profit margin in the book trade which is usually less than that in other trades in the region. All possible steps should be taken to expand bookshop networks in the region. If retail trade is to survive, publishers should resist the temptation of supplying books direct to libraries and institutions, which, in turn, should insist on procuring books from local retailers. The retail book trade should be strengthened by public administration by allocating adequate space for the establishment of bookshops and book markets when planning new towns, and by allowing concessional rents (as is being done in Indonesia) and reduced rates for the use of telephone and electricity. Governments could sponsor or finance the setting up of model bookshops in selected areas which could also act as the training ground for the bookselling staff in various aspects of the trade.

Because the existing bookshops are too few in number and concentrated in cities and large towns, unconventional channels should be also utilized for retailing books to provide new outlets or where they can be adequately exploited, e.g. post offices, railway bookstalls, petrol pumps, community project centres, airports, tourist spots, rural bazaars, youth centres, farmers' and factory workers' clubs, as well as such assorted outlets as newspaper stalls, stationery shops, health clinics and establishments dealing in drugs, photographic material, toys, groceries and general merchandise. Many of these avenues can provide new sale points mainly for the mass-circulation books with the patronage or government and co-operation of local authorities.

In Papua New Guinea and Fiji, newspapers, magazines and books are distributed mainly through bookstores, news agencies and department stores in towns and urban centres. In small islands, there are hardly any well-structured retail outlets for books. Commercial channels for supplying books to rural areas and distant places are conspicuous by their absence owing to lack of transportation facilities and limited road network. There is a growing awareness in these countries of the need to establish bookshops and develop non-conventional channels of book distribution.

Australia has approximately 3,000 retail book outlets of which about 1,000 are genuine bookshops. The number is not adequate for a country which is 2,500 miles wide. The newsagents, the distributors of newspapers and magazines therefore provide the greatest number of outlets. Most of them carry a wide range of paperbacks and popular trade books but no serious literature. It could be said that there is not yet a fully adequate network of bookshops throughout Australia and consequently specialized books are sold in specialized non-book outlets.

In New Zealand, however, booksellers are the main retail outlet for books, because of their widespread distribution and quality. There is a major and a secondary bookstore chain; other bookstores are all independently owned. In relation to the country's population (3 million) and the communities they serve, New Zealand's bookstores are probably the best in the world. Over 1,200 establishments are listed as booksellers, newsagents and stationers (of which about 450 shops make up the membership of the Booksellers Association of New Zealand) and the retail value of book sales in 1980 was estimated at $130 million.

(d) Book clubs

Book clubs - or home library plans as they are sometimes called - are the main method of distribution outside the bookshops and libraries. They are a particularly effective means of carrying endogenous books to readers in distant places or rural habitations with no retail outlets. Under this arrangement the commitment of a certain sum of money entitles the subscriber to a variety of books at concessional prices. The publisher, who is assured of minimum sales, can afford to give a discount to the reader in the form of, say, any ten books in a given period for the price of only nine. The subscriber is supplied periodically with a catalogue of books, generally paperbacks with popular reading material, from which he can choose titles that interest him. The scheme is noteworthy, because apart from its economic advantages, it brings the rural reader on a par with the urban reader, since books as a rule are supplied postage-free.

There need be no misgivings that such schemes of selling books directly to the reader by mail will damage the retail book trade. Indeed book clubs have proved to be fertile breeding grounds for creating many new clients for established bookshops. Experience has borne out that many of the persons who subscribe to such plans happen to be those who, for one reason or another, never purchased books before, except for compulsory textbooks. According to a survey conducted in South India some years ago, 17 per cent of men and 23 per cent of women members had not owned a single book before they joined the book club. The value of book clubs is evident for certain types of readers - those who prefer to have their books delivered at home or whose choice is narrowed to a relatively restricted selection of literary or professional titles.

In Asia there are very few countries in the region where the book club scheme has been given a fair chance to operate. Only India has been able to operate some book clubs successfully. A book club started in Delhi about two decades ago is reported to have enrolled about 400,000 members from time to time and the present active membership is 20,000. Japan experimented with book clubs, but had little success, mainly due to high postal rates and the Japanese habit of wanting to see the book before buying it.

In the Pacific, New Zealand and Australia have some book clubs as a feature of their book distribution scene. One book club in Australia has over 150,000 members but it does not sell more than 5,000 or 6,000 copies of any single title. In New Zealand, the Booksellers Association runs a project called "the Book of the Month Scheme", under which buyers are offered about four choices each year of selected books at a special concessional rate. The sale of some of these titles has been a great success. Such ventures have yet to make inroads into the other island countries of the region. In Papua New Guinea, there are publishers who have a subscription service for periodicals. Indeed, one local magazine meant for high school and post-high school readers has a press-run of 60,000. However, owing to unsatisfactory mail and transportation services, newspapers and magazines are out of date by the time they arrive at their destination.

The book club movement has not been able to make a mark in the region as yet. This may be due to the low number of readers or the inability of the publisher to maintain the requisite quality and variety of production and regularity of supply, lack of imagination or promotion campaign, or, at times, even the unreliability of the postal system. The main strategy is to take books to the buyer so that he can pick up the books of his choice quickly like a consumer product. If launched properly, the book club movement can help to solve the crucial problems of high cost of production and non-availability of books in rural areas and remote islands in Asia and the Pacific.

(e) Postal rates

To enable the book club movement to operate on a large scale and to encourage bookselling by mail, it is essential that postal rates for books be lowered. This is particularly important in the absence of retail outlets for books in the remote islands and large rural habitations of Asia and the Pacific. High postal rates, apart from increasing the prices of books, inhibit their mobility and hinder the spread of the reading habit. While some countries of the region apply a differential rate for transporting books, many do not have adequate postal concessions. Australia does not have a special concessional rate for book postage except for books posted overseas. The Japanese postal system does not treat books favourably except that book parcels are charged a uniform rate no matter how far they are sent, while the rate for other goods varies according to distance. In China, to facilitate book purchases by people living in remote areas, city bookstores accept mail orders, and postage, freight and ordinary packing fees are exempted. Thus, a book shipped from Beijing or Shanghai to such remote places as Tibet or Xinjiang is still sold at a uniform retail price, even though postage may have exceeded the cost of the book.

India has provided substantial concessions in this matter. For 500 grams of weight, book post charges are half a rupee compared to one and a half rupees for carrying other articles. Similarly, the registration fee for value payable book parcels up to Rs 10 is less than one-third of the normal registration fee. Again air postage on books is 50 per cent of all normal charges and is further reduced for bulk-bag service to certain countries. On the other hand, there is one Asian country where the general postal rate for carrying book parcels is stated to be higher than the rate for carrying other articles!

In fact, books have a deserving case for concessions in postal rates, and railway, sea and air freight. Apart from their being ambassadors of knowledge and purveyors of culture, books have some peculiar characteristics as a commodity. As against other commercial items that are transported, they are handled in smaller quantities, have a relatively low price and weigh comparatively heavy, so that their physical transport is expensive in relation to their value. Because of their shape, they pack well, occupy less cubic capacity and are easily transportable. Mail order selling, which is vital to the distribution of indigenous books, cannot thrive without substantial concessions in their transportation charges which do not seem to have been provided in many countries of Asia and the Pacific.

It would be desirable for each country of the region to carry out a study of the effect of current postal rates on the distribution of books. If the results of this investigation indicate - as is likely in most cases - that high postal rates have an adverse effect, the book industry can make a convincing case for remedial action by government.

(f) Market research

Market research and surveys provide the information necessary for developing a publishing programme to suit the interests and tastes of the reader. They also help the publisher to identify the most effective promotional techniques and determine the appropriateness or otherwise of a particular advertising medium for a given title or series of books offered for sale to a particular clientele. The overall objective of market research is to increase sales, to avoid losses and to maximize profits.

The developing countries of Asia and the Pacific depend largely on office records and analysis of data collected through questionnaires or reports by salesmen and field representatives. One simple method available to publishers is to analyse the sales of their books by type during the previous years and simultaneously make similar surveys of their competitors' activities. These special types of survey are conducted by individual publishers to arrive at guidelines to further their publishing programmes. There are some basic points on which market research may be useful to the entire book industry, e.g. tastes and preferences of special categories of reader, timing or methodology of institutional purchases, cost implications of different formats of books, effectiveness of different advertising media, cost and appropriateness of different modes of book transportation. While ad hoc surveys for the promotion of their book sales can be undertaken by publishers themselves, basic research on book promotion in general calls for sponsorship and financial support by government agencies, national libraries and professional associations of the book industry. In Australia, for example, the Literature Board of the Australian Council commissioned a management company to prepare a report on the "Reading and Buying of Books in Australia". This was published in 1978 and was the first serious attempt to survey the reading and buying of books in Australia. Japan has also attempted through its Book Publishers Association to collect data on certain types of publication. But, by and large, it is the bookshop or the distribution network or at times the readers' reaction which indicate the demand and sale potential of particular publications in Japan.

In China, where the distribution system is centralized, some pre-publication research is carried out through retailers and wholesalers to decide on the print-run. Lists of books to be published are sent by wholesalers to the retail stores all over the country. The retailers ascertain the potential market for such titles and report their findings to the wholesalers, who in turn add up the nationwide demand and use it as the main criterion for negotiation with the publishing house in determining the size of book editions.

(g) Development of libraries[1]

Book development and library development go hand in hand. While publishers feed the libraries, the libraries in turn provide the book industry with a firm economic base. By promoting large editions of books at far lower cost per unit, they also enable publishers to reach a large market of individual purchasers and thus help non-library readers also. Libraries have a special role in developing countries where the purchasing power of the average reader is low and where nearly three-fourths of the total turnover of the book trade is absorbed by institutional purchases.

(1) Indications on libraries and on their holdings by category of libraries are given in Table 9 in Appendix 1.

Recognizing of the vital role of libraries in Asian book development, the 1966 Tokyo meeting strongly recommended that an integrated plan for library development be adopted by each country as a part of its programme for social and economic development and should be included in a national plan. While many Asian countries have recognized the important role of libraries in social development and lifelong education by endorsing the NATIS concept,(1) the overall situation is far from satisfactory. School, children's and village libraries are still neglected areas in many countries. Many libraries still follow the pernicious "tender system" for book purchases. It is a common practice for libraries to place orders directly with a wholesaler or publisher, thus bypassing the local bookshop which is finding it difficult to survive without library support. The basic bibliographical tool, the national bibliography, is either not issued by many countries, or running behind schedule. Shortage of funds and skilled staff is yet another perennial problem with the library system in Asia.

So far as the Pacific region is concerned, both Australia and New Zealand have set up an efficient network of library services. However, because of rising costs of administration and equipment, a substantial portion of library funds is not available for purchase of books. As regards the developing countries of the region, Fiji and Papua New Guinea have earned a certain reputation for their library services, have a National Library and bring out a national bibliography. Library facilities in other countries of the region are less well developed.

To overcome the paucity of funds for library development, consideration may be given to integrating public libraries with the educational library complex, interloaning between libraries, library twinning between institutions, maximizing the benefit from bookmobiles and rotating book boxes and fixing a certain percentage of the educational budget for library development. Non-governmental sources of funding should also be explored and utilized to finance library development. Other steps to improve the situation may include national bibliographical control that ensures regular release of not only national bibliographies but also select annotated book lists;(2) adequate training facilities for librarians; setting up of special book banks with multiple copies of textbooks, recommended books and reference books for use by university students and teachers; priority to the expansion of children's and school libraries and village reading rooms; total abolition of the tender system and standardization of discount rates for library purchases; fixing a certain portion of the book buying budget for the purchase of endogenous books; making purchases as far as possible from local booksellers; provision of a documentation service and audio-visual equipment in as many libraries as possible; and enactment of legislation to facilitate library expansion where necessary.

V. PROMOTING THE BOOK INDUSTRY

The three previous sections have sought to identify separately the factors that affect the creation, production and distribution of books in Asia and the Pacific. However, book publishing is an integral process and any improvement or deterioration in one area often leads to corresponding reactions in the other. Then there are some common factors which affect the entire book industry. This section will highlight some important elements that have a direct bearing on the overall promotion of national book industries in Asia and the Pacific.

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(1) Intergovernmental Conference on the Planning of National Documentation Library and Archives Infrastructures (1974).

(2) An International Congress on National Bibliographies was organized by Unesco and IFLA in 1977.

(a) Planning for book development

Any endeavour to formulate a national book development plan should precede a recognition on the part of national authorities of the important role of books in the development of the individual and in the progress of society. Books have long demonstrated their effectiveness as the least expensive and the most essential instrument for the preservation and transfer of knowledge. They serve as a repository of the cultural heritage of a people and also as a means of disseminating it. Books are also the most important vehicles for expressing new ideas, minority views, dissent and criticis[illegible] They are an indispensable factor for economic growth, particularly in today's tec[illegible]ogical society. If we look at the world's largest book producing countries, t[illegible]e would appear to be a direct positive correlation between book publishing and social and economic welfare. A great quality of the book industry is that it requires only limited capital investment and is capable of efficient organization in small enterprises. Despite - or, perhaps, because of - their meagre claim on national resources, books have often not received the attention they deserve from national planners.

Despite the unprecedented impetus created for book promotion by International Book Year 1972, books do not as yet command a high priority in the national development plan of any developing countries in Asia and the Pacific. Since 1966 almost every book development meeting in the regions - national subregional, regional or international - has stressed the need for planning for book development as an integral part of overall national development planning. Yet, there is hardly any country in the region whose national development plan contains a chapter on book promotion. References to book publishing are found in the chapter on education and are, in most cases, confined to the provision of books for formal education and adult literacy. Efforts to have book production recognized as a priority industry have also not borne fruit. The Charter of the Book could be taken into consideration in each country since it outlines the principles which should guide promotion of books commensurate with their vital role in national development.

A common feature in many Asian and Pacific countries is that several wings or departments of government pursue their own policies of book production and distribution. While book publishing may be undertaken by as many government agencies as is necessary, it would be desirable that one particular ministry in every country be designated as fully responsible to handle and co-ordinate all matters concerning book promotion. Instead of taking ad hoc decisions on such vital matters as availability of printing paper, reduction in production costs and provision of adequate reading material for informal education, each country might formulate a national book policy in the overall context of its national resources and requirements. In the first instance, each country might take stock of the present book supply situation to ascertain whether the targets laid down by the 1966 Tokyo meeting for 1980 (80 pages of strictly educational books and 80 pages of general books per person per year) have been attained. If not - and this seems to be the case with every developing country in the region since none has been able to achieve the growth rate of 12.5 per cent in annual supply as envisaged by the meeting - the shortfalls and the reasons therefore need to be identified. In keeping with its own requirements each country might lay down revised targets for, say, 1990 or 2000 both for educational books and general books and endeavour to achieve them within the framework of the national book policy that should ensure not only putting the available resources to most effective use but also expanding those areas where promotion is urgently needed.

(b) Book development councils

The best way to ensure that the promotion of endogenous books receives due attention and support in national planning is to set up a high-level central agency to plan and co-ordinate the creation, production, distribution and use of books. The ideal structure for such bodies often known as national book development councils - seems to combine representatives of the public authorities connected directly or indirectly with book development, those of various professional associations of the book industry, and a few enlightened intellectuals with no vested interest who would take an objective view of the problems of the book industry. An apex institution of this kind could provide a common platform for the exchange of ideas and experience among various components of the book industry and eliminate any clash of interests. The council would be an ideal agency to formulate a national book policy and fix targets and priorities for providing reading material in response to the changing needs of the country. It could become a forum for continued consultations between the government and the private sector in sharing responsibility in the book field, e.g. in the production and distribution of textbooks or in maintaining a proper balance between "functional" and "literary" books to avoid duplication and to ensure diversification. With the co-operation of all concerned, such an agency could properly study and sort out the complex problems of the endogenous book industry so as to ensure its planned and healthy growth as an integral part of the national programme for economic and social development.

Although the idea has since gained ground in all developing regions, the need for such central bodies was first stressed in the 1966 Tokyo meeting. Asia took the lead in setting up these bodies and many countries were able to establish book councils soon after the 1966 Tokyo meeting. Today, national councils or similar institutions for book promotion exist in most of the Asian countries. In the Pacific region, Australia has an active National Book Council as a private enterprise, though it receives financial assistance from government. In Fiji too, a Book Development Council has been formed, but is going through teething problems. These councils are making a significant contribution in overcoming the formidable obstacles faced by many countries in their efforts to create and expand endogenous publishing structures responsive to the local needs and national aspirations. There seems to be an information gap about the existence and activities of the book councils in the region. The regular exchange of information and experience among the councils which the Unesco Regional Office for Book Development in Asia and the Pacific, Karachi, organizes should help to fill this gap.

There have also been cases of long delays in the formation or reconstitution of such bodies. The problems that many of these councils face arise out of some weakness in their own structure. Those that are in the public sector are often advisory bodies that lack executive and financial powers and play merely a token role. The councils in the private sector have a great deal of initiative but are short of funds and staff. In order to be effective, the councils should not only formulate book promotion policies but have the necessary funds and authority to implement some of their own recommendations. Experience has borne out that a council does not function effectively if it remains either an absolutely private enterprise or a purely government organization. Existing councils might well be converted into autonomous organizations, unless they already enjoy such status, and new ones set up as autonomous bodies with adequate financial and professional resources. In most cases the councils will need to be funded through government sources at least initially; later they might also have financial contributions from the book industry associations.

Experience over the last few years has shown that the mere existence or establishment of a council is not by itself a panacea for all ills. The council cannot solve all book development problems unless there is a proper mechanism for its operation. The council may be both the cause and the effect of book development. If the council is not to become dormant or merely an agency on paper, its composition and functions must be reviewed periodically in the light of its own experience and with sound professional guidance and expert advice. Ideally, the council should be a dynamic body taking note of rapidly changing conditions affecting books inside and outside the country in a continuing quest to discover new dimensions for incorporation in its functioning. The main objective of the council is to stimulate and co-ordinate the publication and use of books in such a manner that they become effective tools of national development, and to integrate book promotion plans into overall national development planning. The council ought to provide "a national focal point which might serve both as a clearing house on publishing policy and as a centre where production and distribution problems could be kept under constant study". These objectives might be realized through a number of functions and activities which may vary, both in kind and intensity, in accordance with the particular requirement of each country. However, some basic features are common to all councils. Let us take a few points by way of example.

An essential condition for the council to function successfully is that it should embody representatives of national associations of the different professions connected with books. Such associations develop sustained interprofessional collaboration and contribute to the growth of a healthy publishing industry. They ensure proper co-ordination as well as adequate discipline in the feedback and follow-up work of the council. In cases where professional associations of any constituent of the book community do not already exist (for example, national associations of translators and book designers/illustrators have not yet been formed in many countries), the council might take the initiative and ensure in its own interest that such associations are formed.

In the present era of communication explosion, books are likely to be relegated to the background in national communication policies. However, books have an advantage over most other mass media, for reasons already enunciated. With government support and the co-operation of the representatives of other mass media, the council can ensure a proper place for books in the national communication policies so that the other communication media instead of supplanting books support the cause of book development and enhance the vitality and effectiveness of books as vehicles for cultural and social progress. The council can persuade audio-visual media, such as radio and television, to promote reading through programmes like Book Reviews and Meet the Author. The council can prevail upon newspapers and the periodical press to publicize books through more frequent book reviews and low advertisement rates, by obtaining for them extra quotas of newsprint for the purpose. In short, the council can and should see to it that books are properly integrated with other mass media so as to become a source of maximum benefit.

In some developing countries where the book industry is not yet mature enough, there seems to be a strong temptation to make the council serve a dual purpose, namely that of book promotion and publishing or distribution. Ideally, a council should restrict itself to identifying situations in which there is need for publishing or avenues for distribution. The responsibility for actual publishing or distribution would be left to other agencies. A national council by its very nature is a non-publishing, non-profit-making organization with the avowed task of strengthening and streamlining the infrastructure of the entire book industry. To act as publisher or distributor would mean entering into competition with a sector of the

book industry whose overall interest the council is expected to protect. The council may, however, give special assistance to enable worthy manuscripts of low sales potential to be published and distributed. It can and indeed should publish material to further its own objectives or to promote endogenous books, e.g. a book trade journal and reference materials, such as select bibliographies and directories of book publishers and booksellers. But the publication of other material, however useful and essential, should be undertaken by other national organizations co-existing with the council. A few cases in point are the National Book Trust of India, Dewan Bahasa dan Pustaka of Malaysia and the National Book Foundation of Pakistan, which have been publishing excellent, low-cost material despite the existence of national book development councils in these countries.

(c) Financial incentives

As in other developing regions, financing is a perennial problem for book publishing enterprises in the developing countries of Asia and the Pacific. The problem is particularly acute for small publishers who often require modest capital with low interest rates on a long-term basis, which is difficult to obtain both nationally and internationally.

The problem of financing the book industry has figured in almost all regional seminars and meetings on book development in Asia. The 1966 Tokyo meeting drew attention to this matter and suggested that the International Bank for Reconstruction and Development as well as other international and regional development financing agencies might consider the possibility of assisting the growth of book production in Asian countries. The idea was endorsed at the second Tokyo meeting in 1972 which urged the Bank to offer long-term, low-interest loans to book industries in Asia. While international aid has been made available to finance the production of strictly educational material, nothing seems to have been done to alleviate the acute shortage of funds for the publication of general books, including children's literature. The point again came up for consideration at the 1980 Regional Seminar on Book Publishing in National Languages at Karachi which recommended the creation of an International Book Fund for the purpose. A subsequent regional consultative meeting recommended that book publishing be accorded the status of a vital or essential industry so as to ease its financial other problems.

In the Pacific, Australia provides subsidies for the publication of endogenous books which would otherwise not be produced as they would not be commercially viable. An assessment is made of whether the book would contribute to Australian literature and culture; if so, and the book is not likely to be a success as a commercial enterprise, the Literature Board of the Australia Council provides a subsidy of A$10 per page on release of the book. Australia also has a retail subsidy promotion scheme whereby the Literature Board pays half the cost of advertising an Australian book.

The major sources of funding publications in the Pacific islands are government and the churches. But they support their own publishing programmes. Commercial financing through banks or other financing institutions for private publishers are conspicuous by their absence. The lack of adequate resources is often the cause of non-implementation of even existing programmes of an urgent nature. A number of printing projects in Fijian and Hindi, the two endogenous languages of Fiji, cannot be carried out because of the high cost and low return. New editions of early literature in Tongan, reset in modern Tongan orthography, are proving to be a difficult printing proposition because of the limited technical and financial resources. There are, however, examples of regional co-operation in alleviating these problems. New Zealand has helped Western Samoa to start a printing unit for the Education Department. Some forthcoming publishing projects of the University of South Pacific Centre in the Cook Islands are also expected to receive assistance from the Australian Fund for Pacific Cultures and other regional and international sources.

Book developers in the region should join forces with the professional associations of the book industry and enlist the support of economists and intellectuals to educate the national banking institutions about the complexity of the book business where the demand of the finished product cannot be easily anticipated, the value of unsold stock is nil, and investment yields slow return at least initially. If necessary, special book finance corporations or book co-operatives could be set up to meet the financial needs of publishers and booksellers operating as small units. Small publishing firms are better attuned to selectivity, non-conformity and experimentation and their progress and well-being are in the larger interest of the book industry.

In order to sustain the endogenous book industry and to attract more capital to local publishing, it would be worth while granting some kind of tax relief to endogenous publishers. With a long gestation period and comparatively low rate of profitability, the book industry in the developing countries of Asia and the Pacific deserves at least a partial tax holiday. Since 1970-1971, India has granted 20 per cent tax exemption to book publishers and the Reserve Bank of India also issued instructions to commercial banks to be liberal with small publishing units for their genuine credit requirements. These measures have brought substantial relief to the Indian book industry.

(d) Training facilities

The development of human resources is the prerequisite for the development of any industry. This is particularly true of the book industry in developing Asia and the Pacific which has been manned, by and large, by persons who have had little opportunity for any formal training before entering their profession. While the developing countries of the region have some facilities for instructing the printing personnel and librarians, there is no national training institute for editors, publishers, booksellers, book designers and illustrators. Some national professional associations do organize refresher courses and in-service training programmes but they are ad hoc, few and far between. Taking note of the serious and considerable shortage of skilled manpower at various levels of the book industry, the Unesco Regional Seminar of Experts on Book Planning to Prepare a Medium-Term In-Service Training Programme, held in Bangkok in 1979, urged each Member State to identify its training requirements with assistance from Unesco which had already carried out a tentative regional survey, and to formulate a national plan for the training of book personnel to enable the book publishing industry, in both private and public sectors, to grow and meet the book needs of the people. The seminar recommended that "each Member State plans and organizes, as expeditiously as possible, a national training institute for the book industry personnel to serve as the centre for training and instruction as well as the body for conducting surveys and research and acting as a documentation and information centre".

Among the developed countries of the region, Japan has vocational schools for the training of book editors and has recently started publishing courses in colleges and universities. In Australia, two government institutions provide such training facilities - one a diploma course in bookselling and the other a "Books into Print" course for publishers, editors and designers.

The developing countries of the Pacific region lack training opportunities in every sphere of publishing activity. A five-day course in publishing, conducted in 1979 by the Solomon Islands Centre of the University of the South Pacific, was a commendable initiative worth emulating elsewhere in the region. A "Handbook for Publishers in Solomon Islands", a pioneering effort of the kind presented in the form of a xeroxed manuscript, was used as the text for the course.

The level that needs to be given priority in national training programmes is the submanagerial and middle level which is the backbone of manpower in the book industry. Another important area that has been rather neglected is the training of the teachers. In order that local training produces optimum results, the teachers should themselves be well trained and have adequate experience in organizing courses or participating in such training programmes. The Bangkok seminar therefore further recommended that teacher-training institutions, national book development councils and the proposed national training institutes should, in consultation with the national publishing industry, organize training courses for the book industry teachers. Integration of book publishing and distribution into the university curriculum, like the undergraduate and postgraduate courses run by some Indian universities, might also be useful to ensure a regular stream of semi-skilled personnel to enter the book industry profession. Similarly, the possibility of organizing correspondence courses in related subjects might be explored.

A serious gap in the field of book industry training in Asia and the Pacific is the absence of a regular training institute at the regional level to impart advanced training and to keep the region abreast of the latest developments and innovations taking place in developed countries in the skills and techniques of book production and distribution. Workshops, seminars and training courses organized by the Unesco Regional Office for Culture and Book Development in Asia, Karachi and the Asian Cultural Centre in Japan, although quite useful to the region, have their own limitations. They cater mainly for the top management level and are not frequent enough to meet the total training requirements of the huge region even at that level. Of late, the Unesco Karachi Office has also been awarding fellowships for study tours to book personnel to provide first hand experience and in-service training through inter-Asian exchanges. Above all, the dispatch of mobile teams of experts by the Asian Cultural Centre for Unesco to about a dozen Asian countries so far for collective on-the-spot training in collaboration with the local expertise, is a welcome step, as it permits instruction of larger numbers and the training is responsive to local needs.

There are a few developing countries in the region with a mature book industry which can develop the necessary infrastructure for a regional training and research institute in co-operation with Unesco. It was for this reason that the Bangkok seminar also recommended the establishment of a regional training institute for book industry personnel in an Asian country to meet the training needs at all levels and for all departments of the book industry relevant to the region. Apart from maintaining a roster of teachers in different disciplines and different countries of the region, the regional training-cum-research institute could conduct regional surveys and special case-studies on various aspects of the region's book industry and prepare training manuals and guides and trade directories of publishers, printers and booksellers. The institute could also take the initiative in forming regional associations of the book industry professions so as to create and consolidate a sound forum of expression for the book industry in Asia and the Pacific.

(e) Reading habits and children's books

Book publishing and reading habits are so closely interrelated that any improvement in one is bound to have an immediate beneficial effect on the other. That is why one of the four themes identified for the promotion of books during International Book Year and in the long-term programme of action for book development was the promotion of the reading habit. The factors that affect reading habits are varied and complex. Here are a few facets of this phenomenon in the Asia-Pacific context.

Enduring reading habits are formed at a young age when the mind is most impressionable. For this reason and also because the number capable of reading is always far greater among young people, books for children are considered to be the most

important category of books after textbooks. A good juvenile publication - of fiction or fantasy, of fact or formulae - that really catches the child's interest and leads him on to voluntary reading can be one of the least expensive and most effective tools of learning and a very simple means of socializing the child and developing his personality. In order to be attractive and interesting, children's books must be available in the child's mother tongue and based on his actual needs and experience. There is an acute shortage of such literature in the Pacific islands where children need to be rooted in their cultural past. The absence of suitable literature causes a high percentage of school drop-outs to relapse into illiteracy and lose all interest in reading.

Low literacy, high production cost, low purchasing power and a disorganized market combine to make the publishing of children's books in the developing Asian and Pacific countries an uneconomic proposition. A breakthrough in this field does not appear feasible without strong government support. Besides encouraging local authors, illustrators and publishers in every possible way, government and autonomous publishing organizations can themselves undertake the production and mass distribution of attractive, inexpensive children's books in local languages. It is gratifying to note that many Asian countries are subsidizing children's literature in one form or another. The most important step on the part of national governments would be to ensure a wide market for children's books through institutional buying. Special funds could be created for the purchase of juvenile publications by school libraries and public libraries so as to convert a genuine need into an effective demand.

New vistas were opened up for the promotion of children's books during 1979, the International Year of the Child. The Year gave rise to a wide variety of activities and programmes for the promotion of children's books in Asia. India and the Republic of Korea organized International Children's Book Fairs to commemorate the event. Indonesia launched a contest for schoolchildren to analyse and review children's books. Iran's Institute for the Development of Children and Young Adults made a pioneering contribution in this field through publication and research. Philippines launched a project to compile and publish a bibliography of children's books written for Filipinos between 1901 and 1979. Pakistan organized children's book festivals in various parts of the country. The Asian Cultural Centre for Unesco organized workshops and seminars for the region's writers, editors and illustrators of children's books.

There is a very high percentage of literate non-readers in the region. This is partly due to the lack of publicity and bibliographic information about books brought out in the region. Even in the developed countries like Australia and Japan which have adequate facilities for publicity and efficient institutional support for children's books, there seems to be a decrease in book reading by children. Since reading is the mainstay of publishing, all possible steps should be taken to promote reading as a pleasurable and useful experience. Children could be attracted to reading by gifts of good books on appropriate occasions, story-telling sessions in schools and over the radio and television, reading and writing competitions and co-operative school magazines. Adults could be made book-minded through book weeks, book fairs and festivals including international book exhibitions, reading clubs and groups, book trade journals and directories and reference materials such as subject catalogues and annotated bibliographies. Book reviews are a very important source of information about books, which does not seem to have been properly exploited. Editors of newspapers and periodicals - big and small - could be persuaded to allocate more space to book reviews which should be published frequently and more timely. Investigation and research into the reading habits and tastes of different categories of people and reading motivation campaigns, which have now begun to take place in Asia, should be given serious attention by publishers and book promoters all over the region.

In concluding this brief look at the book publishing perspectives in Asia and the Pacific, we find the situation rather complex. Notwithstanding the progress made in some respects many basic problems need to be tackled more effectively. However, despite certain shortages and shortfalls, there are many hopeful signs. There is an education explosion throughout the region resulting in the democratization of the printed word. Because the literacy and educational levels are generally nowhere near the optimum as yet, the thirst for knowledge in these countries will only grow. Production of endogenous books of quality at reasonable prices and their widest possible distribution pose a challenge to the region. The scarcity of resources compels laying down priorities for improvement not only through national initiatives but also bilateral assistance and regional and international co-operation. Because of the need for a multidisciplinary approach to the book industry problems and the importance of endogenous books as true vehicles of national progress, local and national obligations are of cardinal importance in any programme of book development. Only generalizations are possible in a regional context, and the situation may be more difficult in specific cases. Each country will therefore have to assess its own problems and work out its own solutions. Because book publishing in the region is directly or indirectly related to, or dependent upon, several government agencies, no book development strategy can succeed without a substantial subsidizing and sustained support by the state.

The concerted efforts made on behalf of book development since the International Book Year 1972 need to be intensified further to meet the new challenges facing the international book community. The Asia Pacific region has recently identified the obstacles that still hamper book development and suggested possible remedial measures as reflected in the recommendations of the Unesco Regional Seminar on Book Development in the Western Pacific (Appendix 2) and the Unesco Collective Consultation on National Book Strategies in Asia and the Pacific (Appendix 3). The deliberations of these seminars should guide the formulation of further programme of action towards the realization of the goals "Books for all" and a "Reading Society" in the region.

APPENDIX 1

STATISTICAL TABLES*

Table 1. Asia[1] and Oceania in world book production and population (world figures in brackets)

Year	Book production by number of titles		Number of titles per million inhabitants		Percentage of world book production		Percentage of world population	
	Asia	Oceania	Asia	Oceania	Asia	Oceania	Asia	Oceania
1955	53,200 (269,000)	1,000	65 (131)	68	19.8	0.4	40.0	0.7
1960	49,900 (332,000)	2,000	53 (144)	121	15.0	0.6	40.7	0.7
1965	59,700 (426,000)	5,000	58 (168)	286	14.0	1.2	40.9	0.7
1970	73,700 (521,000)	7,000	63 (187)	361	14.1	1.3	41.9	0.7
1975	85,800 (568,000)	5,000	65 (185)	235	15.1	0.9	42.8	0.7
1978	117,000 (642,000)	6,000	49 (151)	259	18.3	0.9	56.7	0.5

* Source: Unesco Statistical Yearbook 1978-1979, Paris, Unesco, 1980.

(1) Excluding the Arab States, China and the Democratic People's Republic of Korea.

Table 2. Book production in Asia and Oceania

Country	Year	Number of titles
ASIA		
Afghanistan	1977	232
Bangladesh	1978	1,229
Brunei	1977	94
China	1978	12,493
Hong Kong	1977	1,735
India	1978	12,932
Indonesia	1977	2,265
Iran	1977	3,027
Japan	1978	43,973
Korea, Republic of	1978	16,364
Lao People's Democratic Republic	1976	31
Malaysia	1978	1,328
Maldives	1977	3
Mongolia	1975	490
Nepal	1975	180
Pakistan	1978	1,317
Philippines	1977	1,753
Singapore	1978	1,306
Sri Lanka	1978	1,405
Thailand	1977	3,390
Turkey	1977	6,830
Viet Nam	1977	1,504
OCEANIA		
American Samoa	1978	86
Australia	1977	3,077
Fiji	1976	139
French Polynesia	1977	12
Guam	1978	31
New Zealand	1978	2,079
Norfolk Island	1977	1
Pacific Islands	1978	41
Samoa	1977	240
Tonga	1978	210

Table 3. Book production in Asia and Oceania: number of titles by UDC classes

Country	Year	Total	Generalities	Philosophy	Religion	Social sciences	Pure sciences	Applied sciences	Arts	Literature	Geography/history
ASIA											
Afghanistan	1976	64	-	-	5	-	27	-	-	16	16
	1977	232	20	4	25	71	20	8	2	48	34
Bangladesh	1978	1,229	31	17	113	399	197	124	49	211	88
Brunei	1977	94	25	-	-	32	14	-	-	22	1
	1978	32	5	-	9	2	13	-	-	1	2
China	1978	12,493	*	1,736	*	4,393	*	*	*	1,750	*
Hong Kong	1976	1,494	52	6	53	494	98	103	91	511	86
	1977	1,735	61	9	35	631	86	152	100	517	144
India	1976	15,802	262	419	1,462	4,277	753	2,139	326	5,062	1,102
	1977	12,885	208	370	922	3,649	785	1,228	278	4,458	987
	1978	12,932	256	421	964	3,518	648	911	262	4,796	1,156
Indonesia	1976	2,667	392	56	256	847	131	473	117	184	211
	1977	2,265	311	48	200	700	125	354	95	297	135
Iran	1977	3,027	110	122	648	386	129	264	92	941	335
Japan	1976	36,066	1,130	646	739	9,890	1,646	8,422	2,654	7,890	3,049
	1977	40,905	959	749	879	11,161	1,893	10,141	3,147	8,640	3,336
	1978	43,973	1,061	806	952	12,158	1,452	11,340	3,330	9,940	3,534
Korea, Republic of(1)	1976	13,334	607	702	742	1,478	587	1,629	1,093	5,566	930
	1977	13,081	643	930	829	1,362	737	1,594	418	5,673	895
	1978	16,364	733	872	1,391	2,058	1,108	1,320	1,325	5,947	983
Lao People's Democratic Republic(2)	1976	31	2	6	1	7	-	3	1	10	1
Malaysia	1976	1,302	46	28	62	355	127	120	24	428	112
	1977	1,341	151	13	67	380	121	147	24	347	91
	1978	1,328	46	18	132	449	100	205	19	289	70

Country	Year	Total	Generalities	Philosophy	Religion	Social sciences	Pure sciences	Applied sciences	Arts	Literature	Geography/history
Maldives[2]	1976	8	1	-	-	5	-	-	1	-	1
	1977	3	1	1	-	1	-	-	-	-	-
Mongolia	1975	490	8	10	3	171	27	117	19	118	17
Nepal	1975	180	-	-	2	28	11	31	11	90	7
Pakistan	1976	1,081	48	12	258	199	27	58	20	229	230
	1977	1,331	40	28	330	250	20	68	6	383	206
	1978	1,317	29	4	277	157	8	96	16	535	195
Philippines[3]	1976	1,616	17	26	73	588	116	506	129	118	43
	1977	1,753	65	29	161	540	102	524	91	198	43
Singapore[4]	1976	1,203	38	11	22	493	179	104	43	257	56
	1977	1,207	17	10	24	397	116	81	30	459	73
	1978	1,306	18	2	23	611	109	85	63	336	59
Sri Lanka	1976	1,140	5	26	186	333	47	149	107	196	91
	1977	1,201	26	20	211	403	45	111	113	184	88
	1978	1,405	11	29	314	341	60	133	120	299	98
Thailand	1976	2,578	324	72	303	1,103	101	267	72	167	169
	1977	3,390	326	67	232	1,495	145	464	116	293	252
Turkey	1976	6,320	510	147	337	1,977	400	956	316	1,191	486
	1977	6,830	689	196	327	2,158	502	1,013	346	1,116	483
Viet Nam	1977	1,504	-	22	-	235	339	225	50	530	103
OCEANIA											
American Samoa	1978	86	7	-	-	18	1	1	-	12	1
Australia	1976	2,325	89	13	90	878	168	379	174	370	164
	1977	3,077	105	27	97	1,034	242	534	249	468	321
Fiji[5]	1976	139	-	-	-	50	47	24	2	16	-

French Polynesia	1977	12	-	-	-	7	-	3	-	2	-
Guam[2]	1978	31	-	-	-	-	9	22	-	-	-
New Zealand	1976	1,835	118	10	61	632	147	381	168	190	198
	1977	1,939	62	11	55	613	204	438	222	153	181
	1978	2,079	84	15	51	648	193	469	223	194	202
Norfold Island	1977	1	-	-	-	1	-	-	-	-	-
Pacific Islands[2]	1978	41	-	-	-	41	-	-	-	-	-
Samoa	1976	125	25	-	20	26	17	17	5	-	15
	1977	240	46	7	30	73	25	27	17	-	15
Tonga	1976	379	-	-	22	328	3	23	-	-	3
	1977	546	-	-	40	450	6	46	-	1	3
	1978	210	-	-	60	105	-	30	-	-	15

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* Data included elsewhere with another category.

(1) For 1978, school textbooks (687) and children's books (1,028) are included in the totel but not identified in the nine groups.
(2) All first editions.
(3) The figures represent only those books which have been received in the national library.
(4) The data do not include government publications.
(5) Data refer to school textbooks only.

Table 4. Book production in Asia and Oceania: number of copies by UDC classes (in thousands)

Country	Year	Total	Generalities	Philosophy	Religion	Social sciences	Pure sciences	Applied sciences	Arts	Literature	Geography/history
ASIA											
Afghanistan	1976	3,072	-	-	135	-	1,290	-	-	1,098	549
Brunei	1977	383	200	-	-	44	59	-	-	75	5
	1978	146	4	-	43	4	75	-	-	5	15
China[1]	1978	3,566,160	*	299,610	*	528,270	*	*	*	131,390	*
Hong Kong	1976	10,558	156	8	357	5,948	595	400	374	2,289	431
	1977	9,219	311	21	141	4,433	435	473	686	1,922	797
Korea, Republic of[2]	1976	39,305	2,142	1,951	2,051	2,487	5,154	4,133	2,454	17,081	1,852
	1977	38,788	4,423	2,193	2,099	3,513	5,714	2,309	729	16,139	1,669
	1978	81,264	10,705	2,427	4,866	11,976	5,842	2,099	4,395	17,086	3,956
Lao People's Democratic Republic[3]	1976	268	55	37	5	88	-	8	7	61	7
Malaysia	1976	4,068	21	91	126	1,254	500	241	66	1,474	295
	1977	4,135	22	151	149	890	576	308	41	1,443	555
	1978	6,081	29	171	981	1,736	646	338	22	1,373	785
Philippines[4]	1977	3,118	110	44	320	731	136	1,155	293	252	77
Singapore[5]	1976	5,334	63	52	77	1,995	1,087	357	205	1,118	380
	1977	4,931	35	22	94	1,369	623	271	76	2,072	369
	1978	6,948	61	3	94	4,023	575	220	331	1,264	377
Sri Lanka	1976	6,133	5	87	1,009	1,815	540	226	149	2,057	245
	1977	6,050	17	46	1,279	2,043	347	330	173	1,597	218
	1978	6,448	26	93	1,600	1,268	427	293	405	2,168	168
Viet Nam	1977	64,807	-	688	-	9,351	19,159	2,407	505	26,444	6,253

OCEANIA											
American Samoa	1978	35	3	-	-	10	1	1	-	4	4
Fiji	1976	220	-	-	-	21	112	46	6	35	-
French Polynesia	1977	14.8	-	-	-	7.7	-	6.4	-	0.7	-
Guam[6]	1978	1.9	-	-	-	-	1.3	0.6	-	-	-
Norfolk Island	1977	1	-	-	-	1	-	-	-	-	-
Pacific Islands[7]	1978	17	-	-	-	17	-	-	-	-	-
Samoa	1977	115.6	15.0	2.0	34.0	33.6	22.0	26.4	0.8	-	1.8
Tonga[8]	1976	59	-	-	4	8	8	5	-	-	7
	1977	50	-	-	7	16	10	6	-	1	10

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* Data included elsewhere with another category.

(1) School textbooks and children's books (2,606,890,000) are included in the total but are not identified in the nine groups.
(2) For 1978 school textbooks (13,780,000) and children's books (4,132,000) are included in the total but are not identified in the nine groups.
(3) All first editions.
(4) The figures represent only those copies of which titles have been received in the national library.
(5) Data do not include government publications.
(6) All first editions.
(7) All first editions.
(8) For 1976 school textbooks (15,000) and children's books (12,000) are included in the total but are not identified in the nine groups.

Table 5. Production of school textbooks in Asia and Oceania: number of titles and copies

Country	Year	Number of titles			Number of copies		
		Books	Pamphlets	Total	Books	Pamphlets (in thousands)	Total
ASIA							
Afghanistan	1977	50	-	50	*	-	*
Brunei	1978	8	5	13	57	19	76
China	1978	*	*	4,614	*	*	2,606,890
Hong Kong	1977	107	93	200	828	2,937	3,765
India(1)	1978	864	-	864	*	-	*
Indonesia	1977	660	172	832	*	*	*
Iran	1977	36	-	36	*	-	*
Japan(1)	1978	613	18	631	*	*	*
Korea, Republic of(1)	1978	687	-	687	13,780	-	13,780
Malaysia	1978	206	6	212	1,268	36	1,304
Pakistan	1977	50	-	50	*	-	*
Philippines(1)	1977	120	-	120	240	-	240
Singapore	1978	204	115	319	2,150	905	3,055
Sri Lanka	1978	52	13	65	1,839	253	2,092
Thailand	1977	150	7	157	*	*	*
Viet Nam	1977	730	2	732	46,726	115	46,841
OCEANIA							
American Samoa(1)	1978	8	-	8	7	-	7
Australia	1976	209	85	294	*	*	*
Fiji	1976	73	66	139	179	41	220
New Zealand	1976	29	43	72	*	*	*
Pacific Islands(1)	1978	1	12	13	*	3	*
Samoa	1977	21	-	21	20	-	20
Tonga	1978	-	5	5	-	100	100

* Data not available.
(1) Are first editions.

Table 6. Production of children's books in Asia and Oceania: number of titles and copies

Country	Year	Number of titles			Number of copies		
		Books	Pamphlets	Total	Books	Pamphlets (in thousands)	Total
ASIA							
Brunei	1977	1	-	1	*	-	*
Hong Kong	1977	70	85	155	190	502	692
India (1)	1978	466	-	466	*	-	*
Indonesia	1977	116	146	262	*	-	*
Iran	1977	173	-	173	*	-	*
Japan (1)	1978	2,339	554	2,893	*	*	*
Korea, Republic of	1978	952	76	1,028	4,052	80	4,132
Malaysia	1978	47	105	152	166	420	586
Maldives	1976	5	-	5	*	-	*
Pakistan	1977	183	-	183	*	-	*
Philippines (1)	1977	20	-	20	40	-	40
Singapore	1978	42	57	99	184	503	687
Sri Lanka	1978	3	48	51	23	290	313
Thailand	1977	13	9	22	*	*	*
Viet Nam	1977	52	24	76	3,385	1,797	5,182
OCEANIA							
American Samoa	1978	38	-	38	10	-	10
Australia	1977	75	36	111	*	*	*
New Zealand	1977	11	32	43	*	*	*
Samoa	1977	18	5	23	15	10	25

* Data not available.
(1) Are first editions.

Table 7. Newsprint production and consumption

	Production		Consumption			
		Total	Per inhabitant (kg)			
	1978 (mt)*	1978 (mt)*	1970	1976	1977	1978
World total	24.1	25.4	5.9	5.6	5.7	5.8
Asia (excluding Arab states)	4.2	4.8	1.6	1.9	2.0	2.0
Oceania	0.5	0.5	28.7	24.7	28.0	24.9

* mt = million metric tons.

Table 8. Production and consumption of other printing and writing paper

	Production		Consumption			
		Total	Per inhabitant (kg)			
	1978 (mt)*	1978 (mt)*	1970	1976	1977	1978
World total	38.6	38.2	7.4	8.2	8.5	9.1
Asia (excluding Arab states)	6.8	7.0	2.1	2.7	2.7	2.9
Oceania	0.2	0.3	14.7	11.0	15.4	15.4

* mt = million metric tons.

Country	Year	Type of data	Category of libraries: National	Higher education	School	Special	Public	Non-specialized
Philippines	1977	L	1	*	*	*	*	*
		V	182	*	*	*	1,012	*
		M	6,710	*	*	*	*	*
Singapore[7]	1974	L	1	5	363	45	*	*
		V	800	975	2,244	440	*	*
		M	26,673	23,136	74,754	21,954	*	*
Sri Lanka[8]	1977	L	1	5	793	73	381	*
		V	13	540	1,972	528	727	*
		M	*	13,646	*	*	*	*
Thailand	1974	L	1	85	240	*	526	*
		V	882	1,297	153	*	586	*
		M	2,310	88,510	22,873	*	2,790	*
Turkey	1978	L	1	*	*	*	*	*
		V	737	*	*	*	*	*
Viet Nam	1977	L	1	58	*	44	316	*
		V	818	2,922	*	1,070	4,879	*
		M	20,165	*	*	*	*	*
OCEANIA								
American Samoa	1977	L	*	1	*	*	*	*
		V	*	12	*	*	*	*
Australia	1977	L	1	92	*	*	*	*
		V	1,823	16,311	*	*	*	*
Fiji[9]	1977	L	*	1	300	11	9	*
		V	*	*	235	82	91	*
		M	*	5,213	5,800	6,625	*	*

New Zealand	1974	L	1	34	1,067	98	191	*
		V	4,245	2,743	4,829	1,165	4,902	*
		M	103,678	124,039	177,744	26,986	231,218	*
Norfolk Island(10)	1977	L	*	*	1	1	1	*
		V	*	*	6	*	4	*
		M	*	*	448	*	100	*
Pacific Islands	1977	L	*	3	40	21	*	*
		V	*	15	92	*	16	*
Samoa(11)	1978	L	-	1	*	*	1	*
		V	-	10	*	*	36	*
		M	-	300	*	*	*	*
Solomon Islands	1974	L	1	2	6	6	2	*
		V	13	6	14	6	2	*
		M	336	158	345	179	334	*
Tonga	1978	L	-	2	10	2	*	-
		V	-	6	28	4	*	-
		M	-	*	81	18	*	-

* Data not available.

(1) Data on the national library refer to 1974.
(2) The national library serves also as a public library.
(3) Data on the national library refer to 1978.
(4) Data on national and on special libraries refer to 1978. The figure concerning the number of volumes in the national library represents only books.
(5) The figures on special libraries refer to 1974.
(6) Data on libraries on institutions of higher education refer to university libraries only.
(7) The national library serves also as a public library.
(8) Data on libraries of institutions of higher education refer to university libraries only.
(9) Data on special and public libraries refer to 1978.
(10) Data on the school and the special library refer to 1975.
(11) Data on the public library refer to 1974.

APPENDIX 2

UNESCO REGIONAL SEMINAR ON BOOK DEVELOPMENT IN THE WESTERN PACIFIC, SYDNEY - MARCH 1980

Summary of discussions and recommendations

1. The Seminar - the first of its kind - sponsored by Unesco, provided a forum for obtaining an overall view of the state of book writing, publishing, distribution and book use in Western Pacific countries.

Its main objective was to identify the major problem areas in existence in the developing countries in the region and examine ways and means of providing assistance to these countries in order to help them achieve a satisfactory level of book development.

2. The Seminar identified as a fundamental need the upgrading of human resources and technical skills to enable the publishing industry in the developing countries of the region to become more effective.

3. The discussions revealed that indigenous authorship needs to be promoted at national level with incentives such as copyright protection, paid leave to teachers-writers, national awards to outstanding authors, tax dispensation on income earned through royalties, etc. Efforts should also be made to create national or regional literature boards to help provide the incentives needed to promote local literature.

4. In addition, good quality translations should be awarded recognition as an essential professional skill and royalties should be paid to translators. Efforts should be made to establish translation bureaux to offer adequate expertise and facilities or translations and to this end compile and make available dictionaries and glossaries, standardized scripts and spelling and develop facilities for mechanical composition wherever needed.

5. The Seminar was of the opinion that top priority be given to the writing in the vernacular books which reflect national philosophy and relate to local needs and aspirations particularly children's books which play a major role in the development of the appreciation by children of their own cultural values as a stepping-stone and means to preservation of the national heritage.

6. The Seminar observed that high costs of books hamper their availability and use and emphasized the need for steps to be taken to publish books at as low a price as possible, by employing such ways as co-publication, bilingual editions, government subsidies, resulting in increased print-runs.

7. In view of quite evident lack of well-structured distribution channels, encouragement should be given to the establishment of bookshops and in the absence of such, non-conventional channels of book distribution be utilized, such as general stores, school-book outlets, post offices, kiosks, service stations, etc.

8. Furthermore, as high postage rates are a significant obstacle to the distribution of books to rural areas as well as to the interchange of books within the region, which is essential for better understanding and closer co-operation, efforts should be made for concessional postage rates to apply to books and printed matter.

9. While it was recognized that considerable progress has been made in the training of librarians and the establishment of libraries, such efforts appear to be adversely affected by the lack of suitable reading material prepared to respond to the aspiration and cultural needs of the community they serve.

10. In the discussion it further emerged that national language policies were not clearly defined, thus hampering systematic approaches to publishing programmes and it was the view of the Seminar that while national local languages are vehicles for the preservation of the nation's cultural values and traditions, this need not result in their divorce from world languages which are valuable for contributing to and participating at international level.

11. The Seminar gave enthusiastic recognition to the fact that National Book Development Councils are unique mechanisms to achieve concerted action at a national level and thus contribute to greater involvement of all sections of the book world in writing, publishing, distribution and promotion of books.

12. Recommendations

In the light of the above and taking into consideration the discussions during seminar and workshop sessions, the Seminar:

Having noted that books are an essential element of cultural, social and economic development,

Having recognized that the current situation in the book-publishing scene in general and book publishing in national languages in particular leave much to be desired,

Calls for urgent action at the regional and international level;

Urges governments to give priority to book development in their educational and cultural programmes;

Appeals to Unesco to give its full support to the follow-up of the recommendations of this Seminar; and

Recommends that a comprehensive Western Pacific Book Development Programme be developed encompassing the following major elements:

(a) training of writers, illustrators, editors, publishers and printers of books, both at the national and international levels, to improve their skills and efficiency;

(b) co-publication schemes involving the major publishing countries and the developing countries in the region to reduce production costs and provide accessible reading material related to local identified needs;

(c) ensure access to reading material through adequate distribution channels which will enable the community at all levels to obtain the benefits to be acquired through the printed word and to this end ensure that the reduction of postage rates on books, and the development of a library network and reading animation centres be given top priority;

(d) establishing of National Book Development Councils in order to achieve concerted action at the national level.

Participants expressed their appreciation to Unesco and the Australian National Commission for the opportunity they were given to participate in the Seminar and unanimously declared their satisfaction with the successful outcome of it.

They urged Unesco and Unesco Member States of the Western Pacific region represented at the Seminar to study ways and means of taking appropriate action to prepare and launch a Western Pacific Book Development Plan as outlined above, and in doing so identify various sources of finance and technical assistance in order to implement successfully such a Plan.

Participants also expressed their willingness to contribute to the achievement of the goals set forth in the recommendations and to contribute to the design and implementation of the Plan in the near future.

APPENDIX 3

UNESCO COLLECTIVE CONSULTATION ON NATIONAL BOOK STRATEGIES IN ASIA AND THE PACIFIC, KARACHI - APRIL 1981

Recommendations

In light of the discussions of the different topics on the agenda the participants of the Collective Consultation:

Express their wholehearted support for Unesco's initiative to organize a World Congress on Books in 1982 in order to review the present situation and identify obstacles that still hamper book development throughout the world and recommend the inclusion in its deliberations of the following major points that emanate from the analysis of the book situation in Asia and the Pacific:

(a) that national book strategies be clearly defined in order to identify books as a part of educational industries and as such be included in national development plans of every nation; and that book publishing be consequently upgraded to the status of a vital industry;

(b) that an international recommendation be made on the promotion of indigenous authorship stressing the need for creative writing so that more local active writers may be identified and encouraged;

(c) that Unesco study measures at an international level to facilitate the removal of tariffs on materials needed for book production, considering that books are a major element in developing society;

(d) that Unesco undertake a global study of postal rates and the need for postal concessions for the transportation of books and other reading materials with a view to presenting this study at the next General Assembly of the Universal Postal Union in 1984;

(e) that Unesco undertake a study that will clearly demonstrate that distribution systems, including conventional and unconventional channels, should be encouraged and strengthened so that books can be made available to all individuals in the urban and rural areas and that such efforts be considered an integral part of the programmes for literacy and lifelong education;

(f) that Unesco undertake to promote reading material for rural areas and to assist in relevant action at the national level to promote entrepreneurship for rural publishing so as to support efforts against illiteracy;

(g) that the application of the Florence Agreement and the protocol on the free flow of information be reinforced and that practical ways to remove obstacles to its enforcement be studied.

The meeting further endorses the two recommendations of the 1980 Karachi Seminar on Publishing in National Languages as follows:

1. that Unesco undertake the collection and compilation of a series of case-studies on existing wholesale book-distribution operations in the region

and circulate this widely so that it could serve as the model for appropriate action to be taken;

2. that in view of the constant problem of financial restraints on book publishers in local languages, mainly those operating on a small scale, Unesco undertake to study the creation of an "International Book Fund" to assist indigenous book industries in areas like books for children, young people and new literates, in producing large print runs with low unit costs, so as to make these books accessible to markets in Asia and the Pacific and contribute to the realization of the goals of the slogan "Books for All" and of the literacy targets set out by Unesco for the year 2000.

Table 9. Libraries and their holdings by category of library

L = number of libraries; V = number of volumes (thousands); M = length of shelving (in metres).

Country	Year	Type of data	Category of libraries: National	Higher education	School	Special	Public	Non-specialized
ASIA								
Brunei[1]	1977	L	1	5	13	5	1	-
		V	53	38	59	6	76	-
		M	95	1,002	1,956	747	949	-
Hong Kong[2]	1974	L	1	10	223	16	8	-
		V	650	1,103	948	237	230	-
		M	11,100	*	*	8,455	1,875	*
India[3]	1977	L	1	93	*	*	*	*
		V	1,608	12,536	*	*	*	*
		M	48,000	*	*	*	*	*
Indonesia	1977	L	*	*	*	152	*	*
		V	*	*	*	1,327	*	*
Japan[4]	1977	L	1	1,112	41,163	2,019	891	*
		V	3,248	106,414	200,792	31,164	58,786	*
Korea, Republic of[5]	1977	L	2	159	3,954	153	110	*
		V	636	7,596	11,327	1,867	949	*
Malaysia[6]	1977	L	1	30	*	119	16	*
		V	94	1,170	*	836	880	*
		M	1,875	23,400	*	16,729	17,240	*
Pakistan	1977	L	1	*	*	*	*	*
		V	80	*	*	*	*	*
		M	571	*	*	*	*	*